

The Trail Ahead: North Carolina Oyster Tourism and the North Carolina Oysters Brand

Presented at the office of the
Economic Development Partnership of North Carolina
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Our team has drawn upon a large number and wide range of research sources

Primary sources

26 interviews with subject matter experts and stakeholders

Survey of 320 consumers

Survey of 12 restaurants

Visits:

- To **4** oyster leases
- **10** prospective sites

Secondary sources

126 reports from **60** institutions, including:

- Visit NC
- NC Sea Grant
- NC Dept. of Commerce
- VA Sea Grant
- Roland Berger
- NC Rural Economic Development Center

Assessments of **9** comparable trails

The background of the slide is a close-up photograph of numerous oyster shells. The shells are piled together, showing various textures, colors (including white, grey, and brown), and the characteristic ridges of the shells. The lighting is somewhat uneven, creating highlights and shadows across the surfaces.

Agenda

1

Introduction

2

Define approach

3

Brand and experience

4

Implement and sustain

5

Create measurable value



Our primary goals for the North Carolina Oyster Trail

Substantial contributions to:

- 1 Economic growth in Tier 1 and Tier 2 coastal counties
 - 2 Statewide collaboration of stakeholders and subject matter experts
 - 3 Increase in sales of North Carolina Oysters
 - 4 Mariculture Plan that maximizes ecosystem services of wild oysters
 - 5 Statewide pride in North Carolina Oysters and the people and places that produce them
-



Executive Summary

How do we design an implementable blueprint for a North Carolina Oyster Trail that maximizes the economic and environmental benefits of oyster proliferation in North Carolina waters?

- 1 Develop a brand for North Carolina Oysters built on the imagery and experiences of the North Carolina Oyster Trail
 - 2 Cater experiences to a wide variety of visitors and residents at sites across North Carolina
 - 3 Foster collaboration between NC business, organizations, and state agencies
 - 4 Invest resources to create brand infrastructure and plan for long-term sustained growth and impact
-

The background of the slide is a close-up photograph of numerous oyster shells. The shells are piled together, showing various textures, colors (including white, grey, and brown), and the characteristic hinge and edge of the shells. The lighting is somewhat uneven, creating highlights and shadows across the surfaces.

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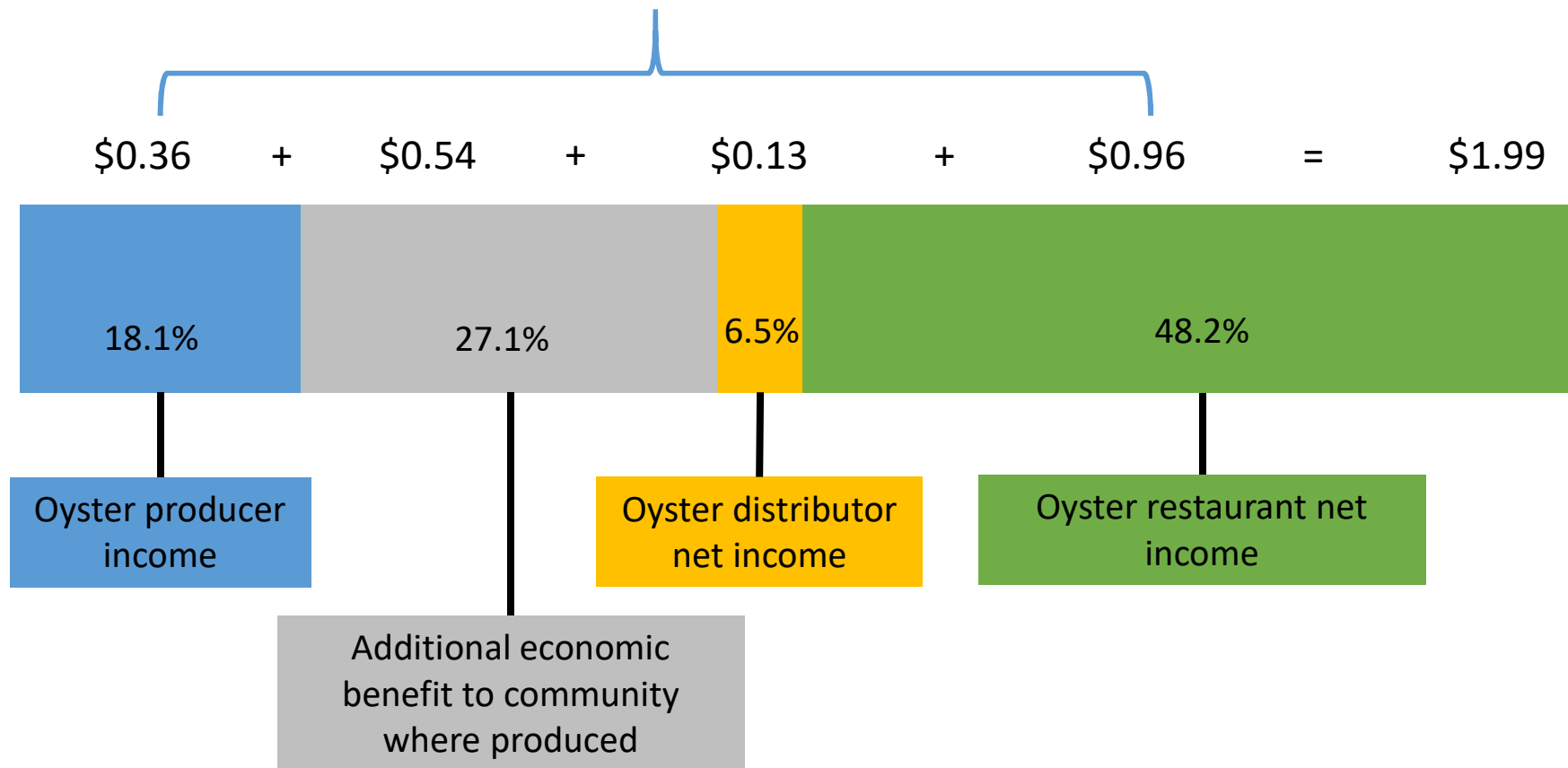
Implement and sustain

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Create measurable value

For every North Carolina oyster sold, the total economic impact is distributed between four main stakeholders

Values for the “average” NC oyster



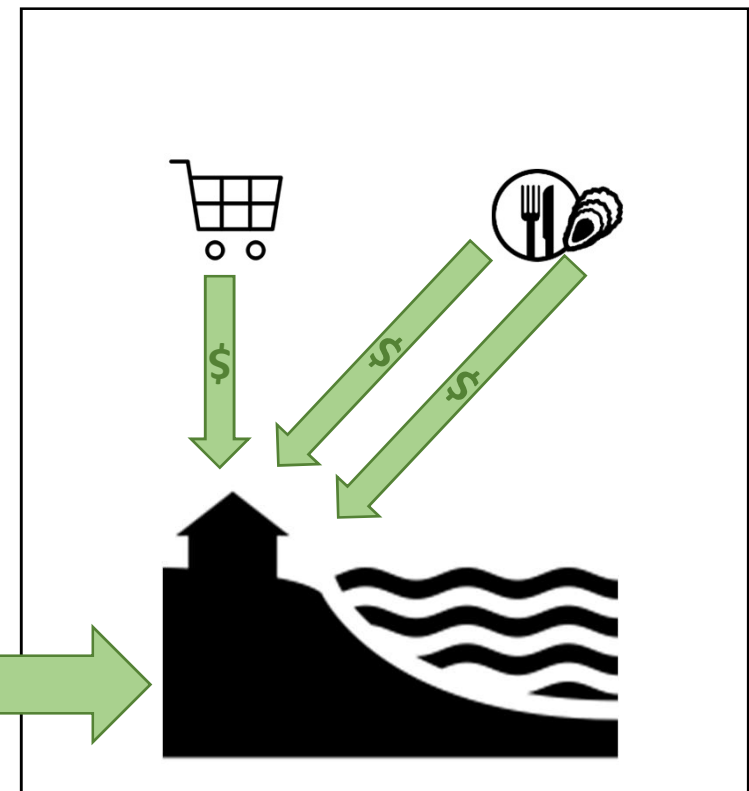


In addition to capturing local visitor spending, coastal communities benefit from inland and out-of-state oyster sales

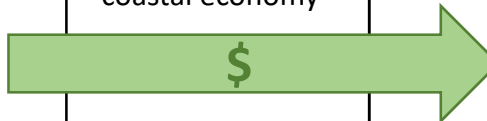
Inland community
(e.g. Charlotte, Raleigh, Atlanta)



Coastal community
(e.g. Currituck county)



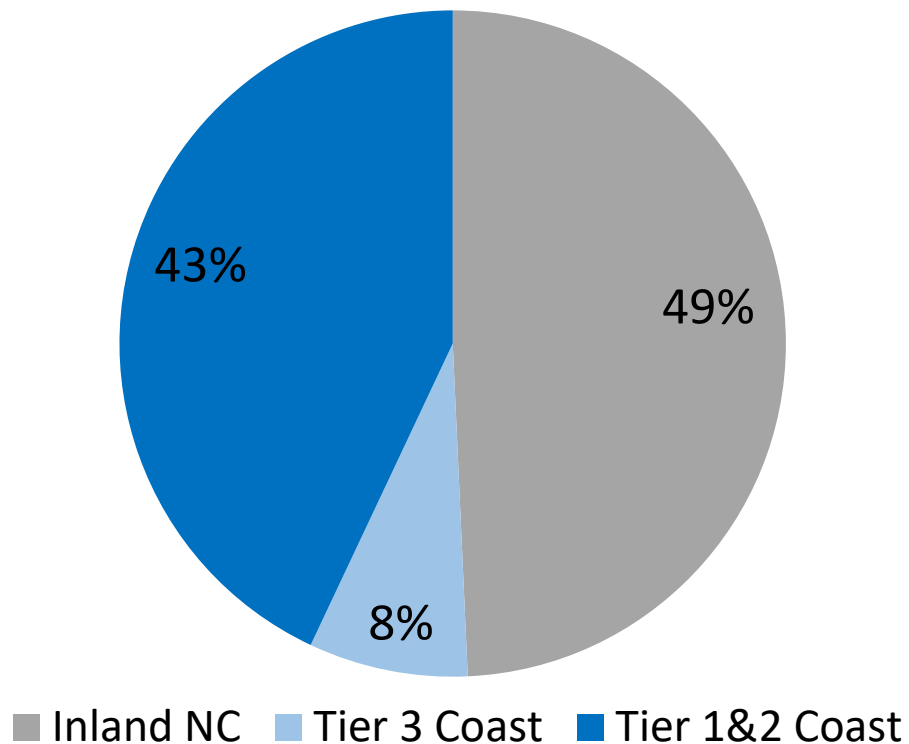
Inland and out-of-state oyster sales are an essential contributor to the coastal economy





To maximize economic benefits to Tier 1 & Tier 2 coastal counties, inland markets must be leveraged

**NC Oyster markets
of greatest importance**



Inland areas will boost overall benefit to coastal counties due to higher sales volumes and higher prices¹

Average restaurant prices for half shell oysters are slightly higher in inland urban areas than on the coast¹

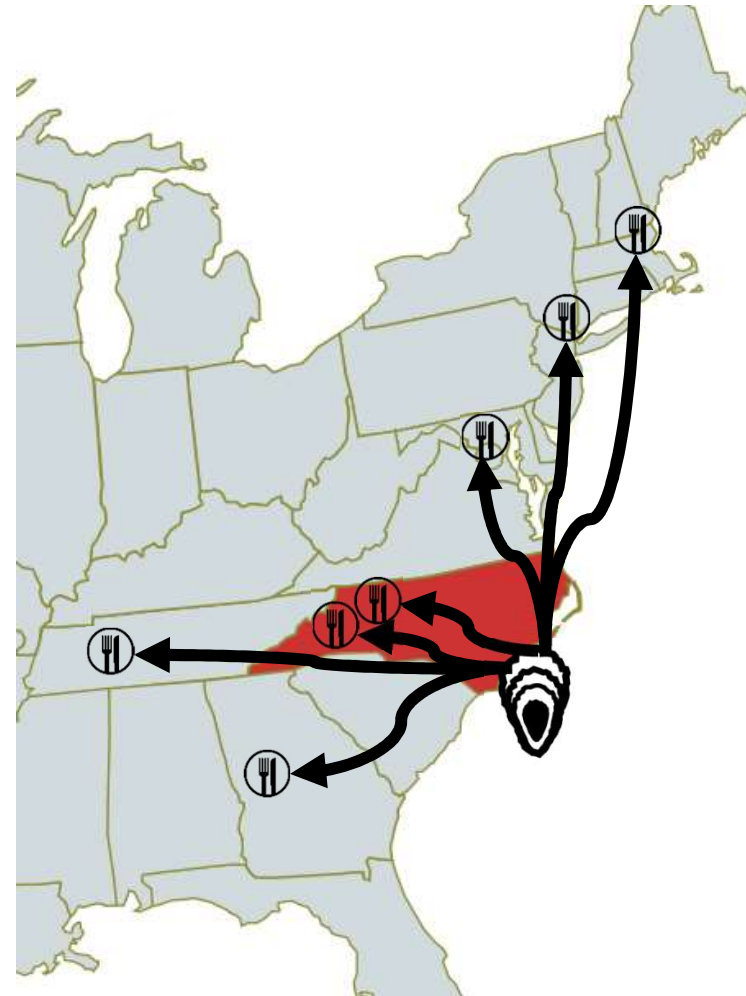
Visitors interested in visiting inland urban areas were willing to pay more than **twice as much** for a half-shell oyster than visitors only interested in visiting the coast²



To sustain growth and reach its potential, North Carolina's oyster industry must export oysters outside of the state

Virginia exports >74% of its oysters to other states ¹


NC Oysters will not have a
“local advantage” in other
states






Establishing the NC Oysters brand will bring identity and trust to the product while differentiating it from the competition


Successful branding will result in:



Attracting visitors
to the state



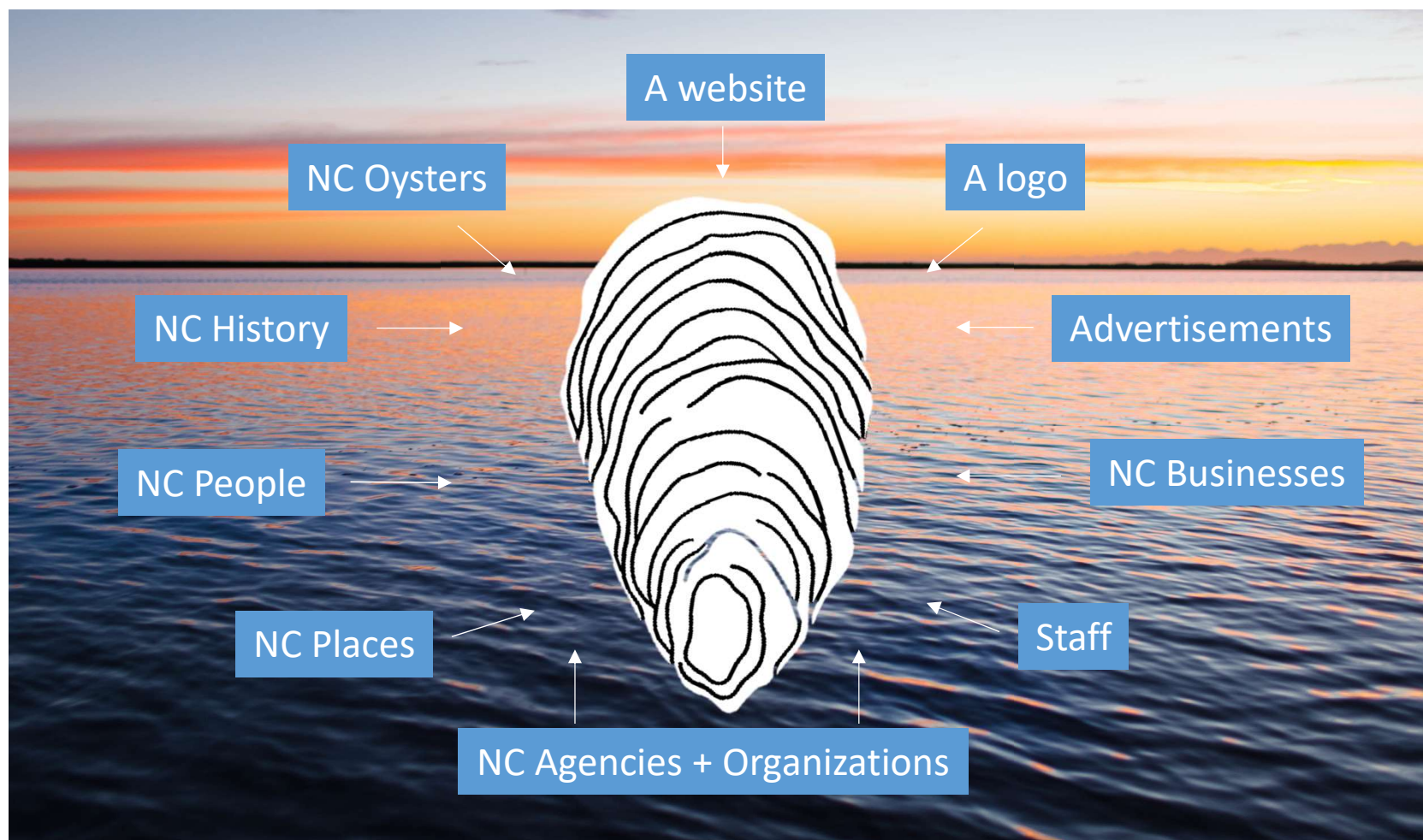
Persuading
consumers to
choose NC oysters
when given
options



Enabling the
exportation and
sale of oysters
out-of-state



The Oyster Trail communicates the North Carolina Oysters brand to consumers and engages key stakeholders



The background of the slide is a close-up photograph of numerous oyster shells. The shells are piled together, showing various shades of white, cream, and light brown. Some shells are open, revealing the dark interior. The texture is rough and irregular.

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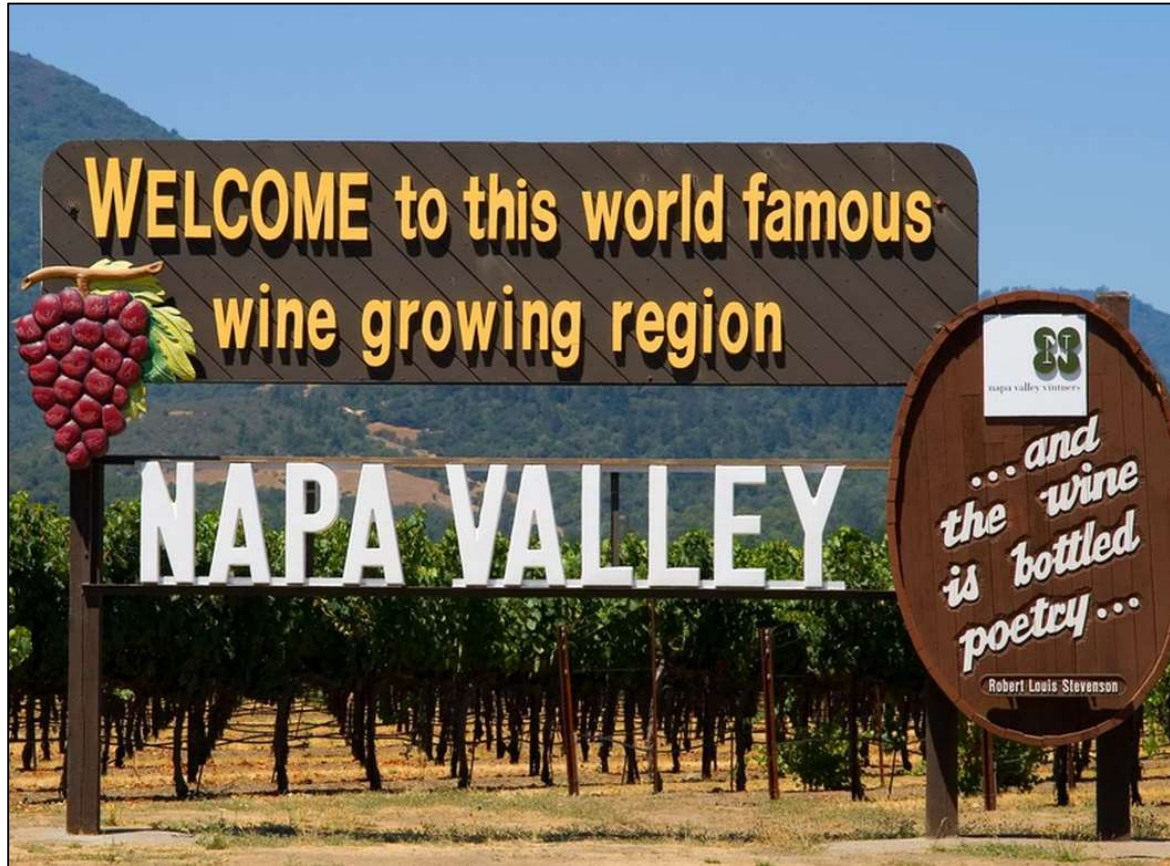
Implement and sustain

5

Create measurable value



North Carolina could be the “Napa Valley of oysters”



- Napa Valley brand adds value to **all** Napa wines
- Adds value to wines **regardless of where they are sold**
- People perceive Napa as being **synonymous** with the very best American wine



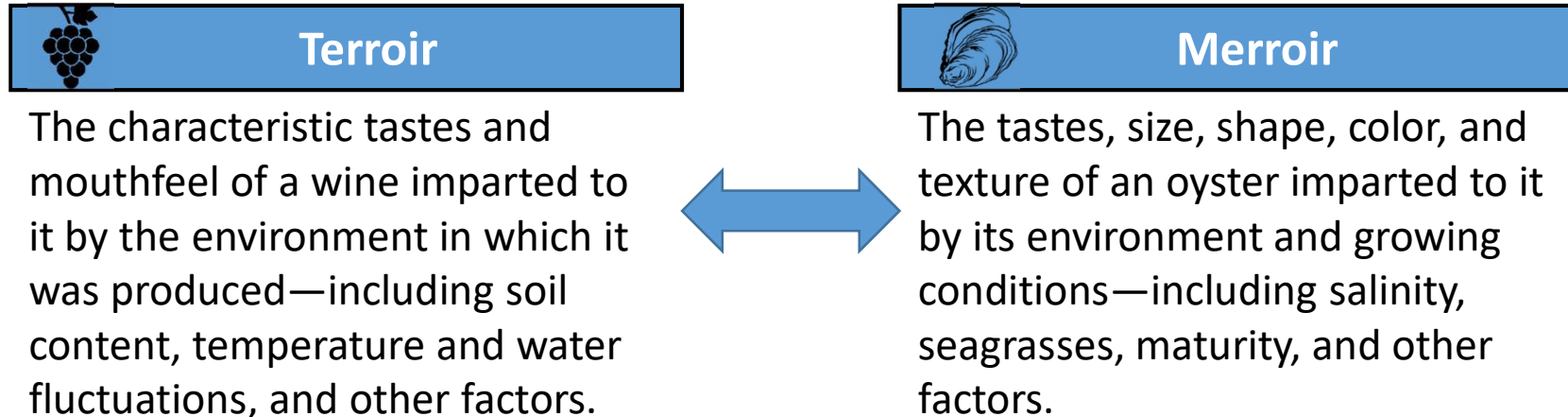
The imagery Napa Valley evokes and the consistency of the brand are what make it so powerful—it's not just the wine

Wine is only a portion of the multifaceted Napa Valley experience.





There are many parallels between wine and oysters that make Napa Valley a good model



Other parallels

- Encouraged to try many varieties to experience different flavors
 - Products are highly influenced by where they are grown
 - Winemakers and oyster growers play very similar roles
 - Napa Valley and North Carolina both offer many complementary activities with fun associated imagery
-



Building a North Carolina Oysters brand must include educating consumers about oysters

- Basic wine knowledge has a high penetration in the general population
- Relatively few people, including North Carolina seafood restaurant owners, possess basic oyster knowledge

Oyster education opportunities

Only 18%¹ of consumers surveyed (29%² of restaurants)
know oysters are safe and good to eat in the summer

*"The 'R Rule' goes back hundreds of years, but that had to do with when it was all a wild harvest... Now that it's all farmed oysters and they're all coming out of hatcheries, you don't really need to pay attention to that rule."*³

Rowan Jacobsen, oyster expert & author of *The Essential Oyster*

Only 32%¹ of consumers surveyed (43%² of restaurants)
had any familiarity with merroir concept

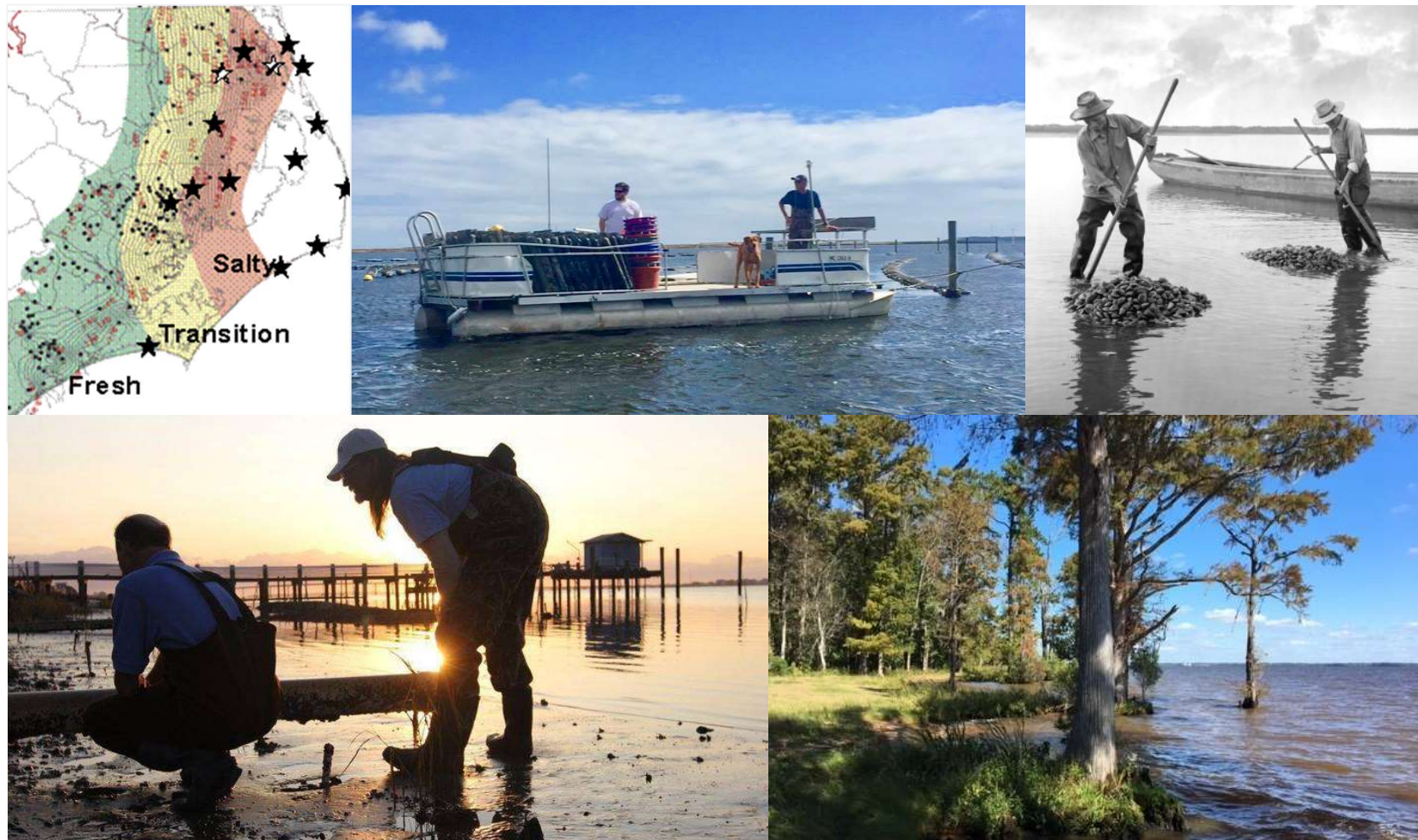


The brand should tie North Carolina Oysters with imagery of North Carolina's well-known beaches and pristine coastal waters



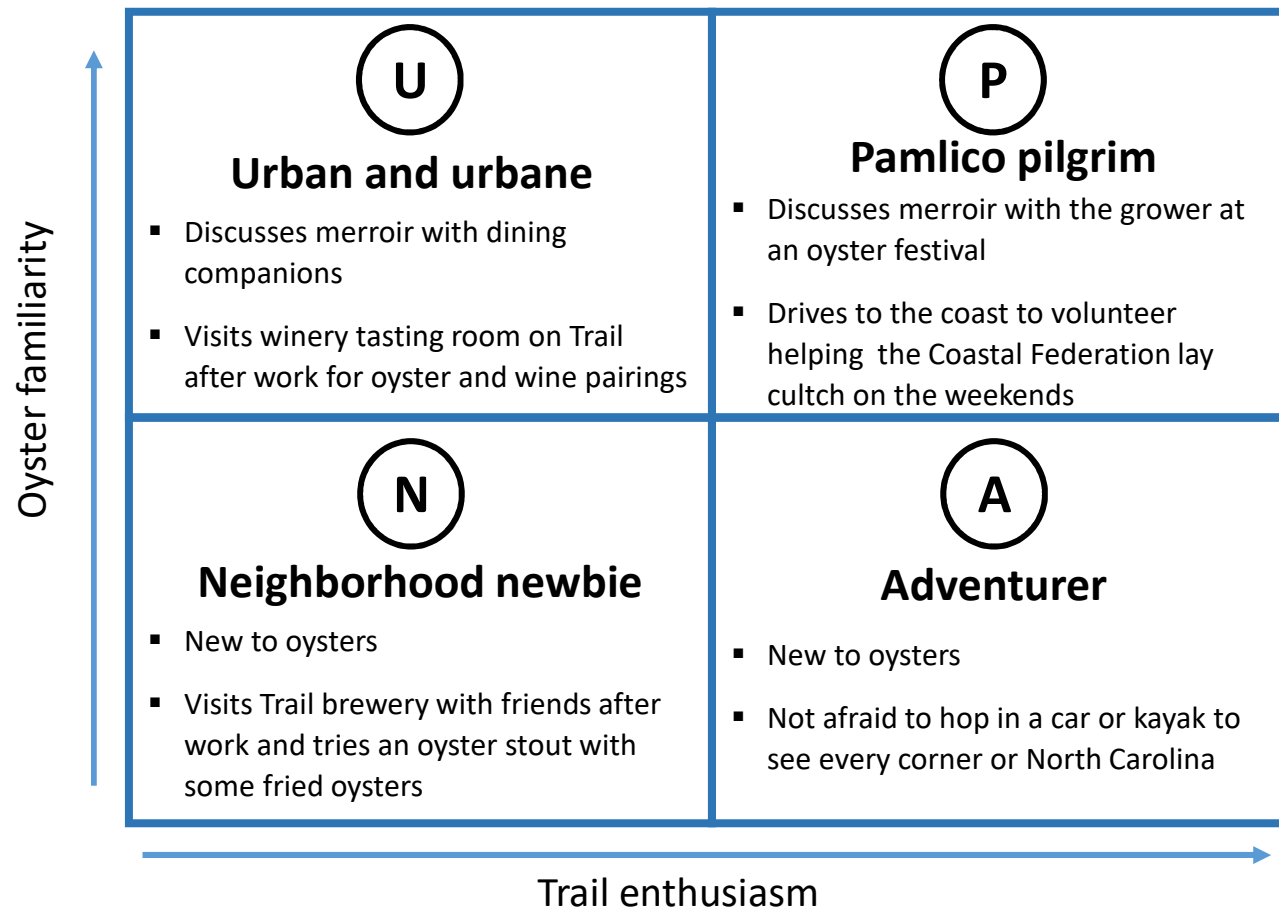


A focus on the unique merroir, people, and history of North Carolina Oysters is another potential brand approach










The North Carolina Oyster Trail will cater experiences to a diverse array of visitors and locals alike





North Carolina Oyster trail will be organized into regions that feature a variety of food and beverage, cultural, and natural sites

Choose your own oyster experience:

Food and Beverage			Cultural			Natural		
Restaurant	Brewery	Winery	Historic Site	Aquarium	Museum	Natural Site	Eco-tour	Outdoor activity
<p>For the connoisseur:</p> 			<p>For the history buff:</p> 			<p>For the outdoorsman:</p> 		
<p>For the beer lover:</p> 			<p>For the science nerd:</p> 					



The NC Oyster Trail will have a variety of food and beverage sites...



Ex. Captain Georges Seafood
Kill Devil Hills, NC



Ex. Ponysaurus Brewing Company
Durham, NC



Ex. RayLen Vineyards and Winery
Mocksville, NC





...as well as cultural and historical sites...



Ex. Pine Knoll Shores Aquarium
Pine Knoll Shores, NC



Ex. Fort Macon State Park
Bogue Banks, NC



Ex. NC Maritime Museum
Beaufort, NC





...and natural and outdoor sites



Ex. Sandbar Oyster Company
Beaufort, NC



Ex. Living Shoreline
Newport, NC



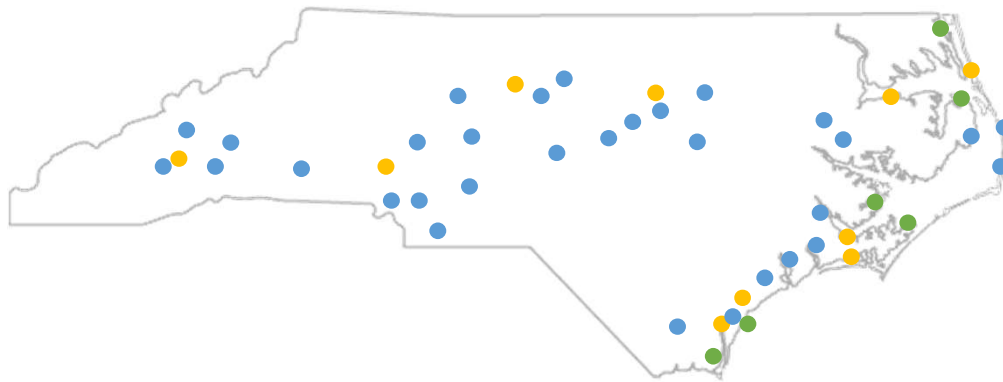
Ex. Roosevelt Natural Area Paddle Trip
Pine Knoll Shores, NC





The Trail organization and supporting infrastructure will connect sites to present visitors with a cohesive, on-brand experience

Without organizing structure, responsibility for communicating the NC Oysters brand would be diffused across dozens of sites



Diffusing responsibilities will result in inconsistency with centralized branding efforts

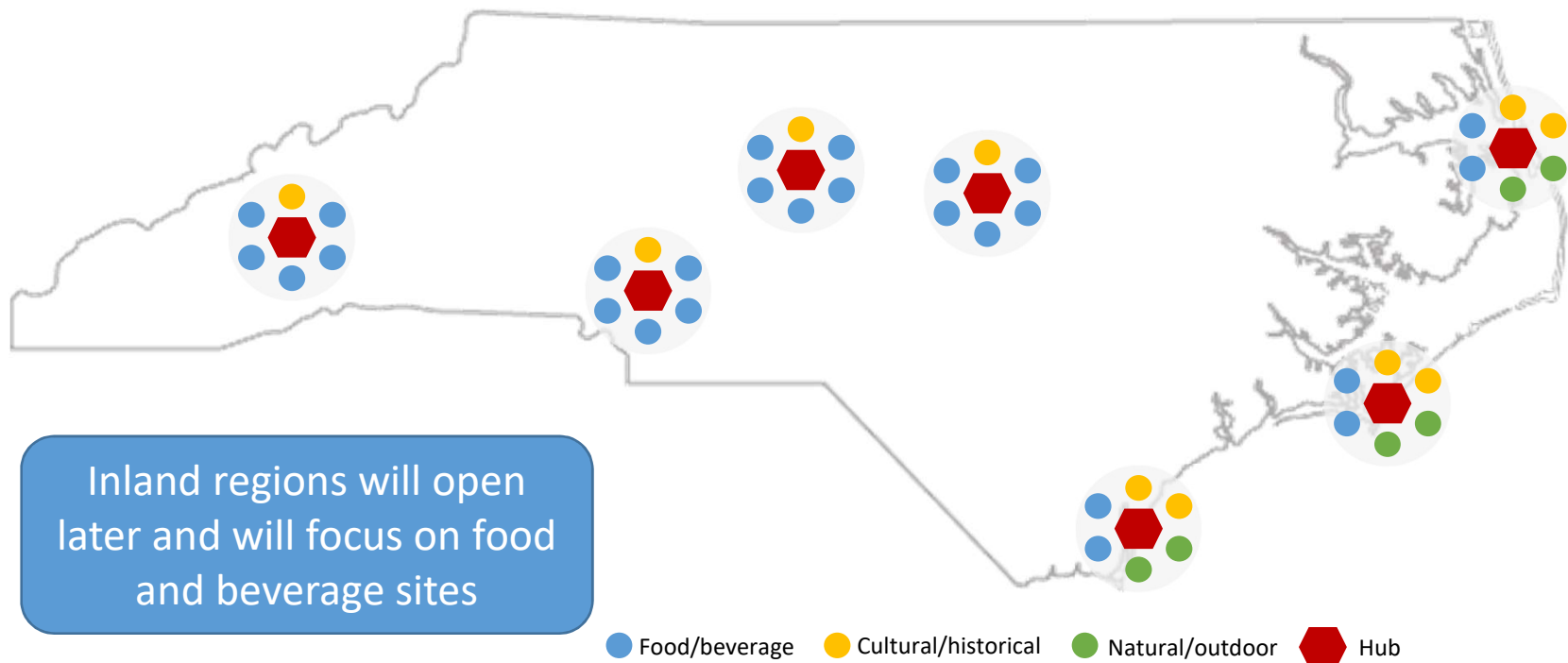
Visitors may be overwhelmed by options and will have difficulty knowing how to organize visits



The regional model will provide visitors with a “pre-packaged” oyster experience in several popular areas within the state

Each region will host 10-30 sites within a 90-minute drive of each other

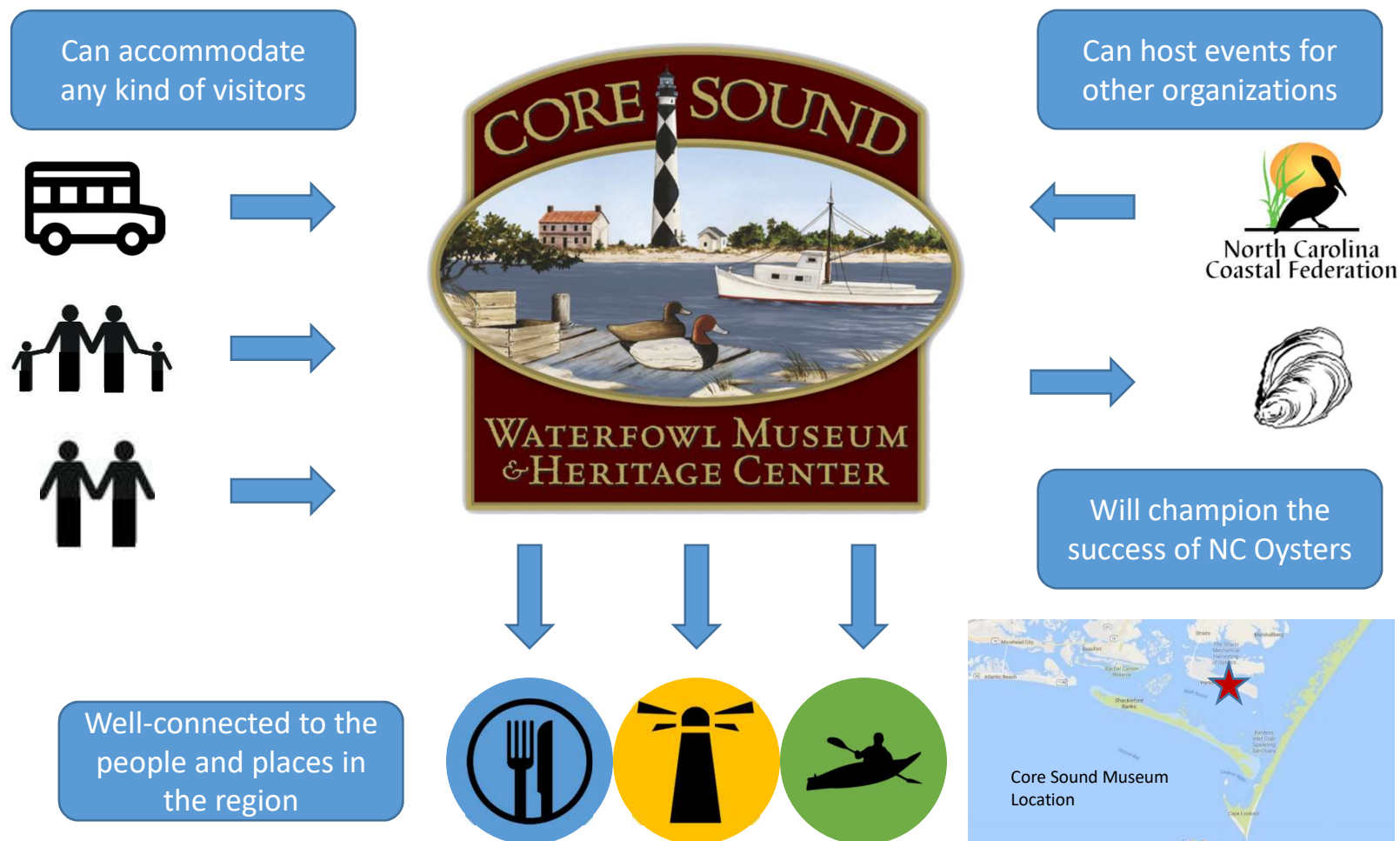
Each region will be anchored by a “hub” site



Inland regions will open later and will focus on food and beverage sites



Hub sites are non-profit champion institutions, such as the Core Sound Museum, at the organizational centers of each region





The Core Sound Museum is also an exemplary hub because of its deep connection to the culture of rural coastal North Carolina

“The Core Sound Museum is the cultural heart of Down East. Everything we do is through the support and hard work of volunteers in this community.”



“We accommodate whatever group is coming in. If they are interested in learning about something in particular, we bring in the right volunteers and make it happen.”

-Karen Willis Amspacher, Executive Director
of The Core Sound Museum



Best-in-class-website will differentiate North Carolina and serve as story-telling platform and information hub for sites and visitors



The Neck of the Woods Local Flavor Trail website is a great example



- Site list with details on each site
- Map and “Plan Your Trip” feature
- “Oyster Story” section featuring interactive and media content such as:
 - Profiles of oyster producers
 - Educational features on triploids, merroir, and ecosystem services
- Information section for participating and prospective sites



Gamification links sites by encouraging visitors to see more and be more engaged on the Trail in pursuit of game objectives

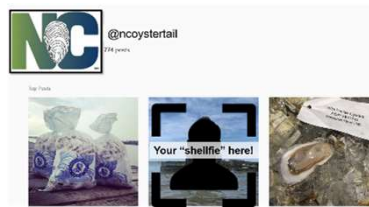
Oyster Trail Passport Game Rules¹

- Enjoy an oyster dish at least **3** Crystal Coast Region food and beverage establishments
- Visit **1** Crystal Coast Region historical site
- Visit the Pine Knoll Shores Aquarium
- Participate in **1** outdoor/natural site activity
- Visit the Core Sound Museum with your stamps to claim a prize:

Carolina Shuckers knife



Be featured on our social media



Crystal Coast Region Site List:



Core Sound Museum



Food and Beverage

Table 9 Seafood Restaurant
Seaside Galley
Sanitary Fish Market
Southern Salt Seafood Company
Shuckin' Shack Oyster Bar
T&W Oyster Bar



Cultural/Historical Sites

North Carolina Maritime Museum
Pine Knoll Shores Aquarium
Cape Lookout Lighthouse
Fort Macon State Park



Outdoor/Natural Sites

Beaufort Paddle
Down East Kayaks
Sandbar Oyster Company
Roosevelt Natural Area
Cape Lookout National Seashore



A storefront logo will connect Oyster Trail sites for visitors and can also link visitor Trail experiences to the oysters themselves

Oyster	Size	Flavor	Origin
Hama-Hama	Regular/XL	Sweet, melon	Washington
Paramount	Regular	Light briny	Virginia
Bay Island	Small	Creamy and Sweet	North Carolina 
Eagle Rock	XL	Medium Briny	Virginia
Yanakama	Regular	Metallic, Sweet	British Columbia
Orient Point	Regular	Light Briny	Long Island
Olympia	Small	Tangy	Washington
Island Creek	Regular	Medium Briny	Massachusetts
Level Point	Regular	Very Briny	North Carolina 
King's Pass	Regular	Sweet	Virginia
Carolina Cove	Regular/XL	Sweet	North Carolina 



*Sample of what a logo
might look like



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North Carolina Oyster Trail launch implemented through a six-phase plan

Convene and fund

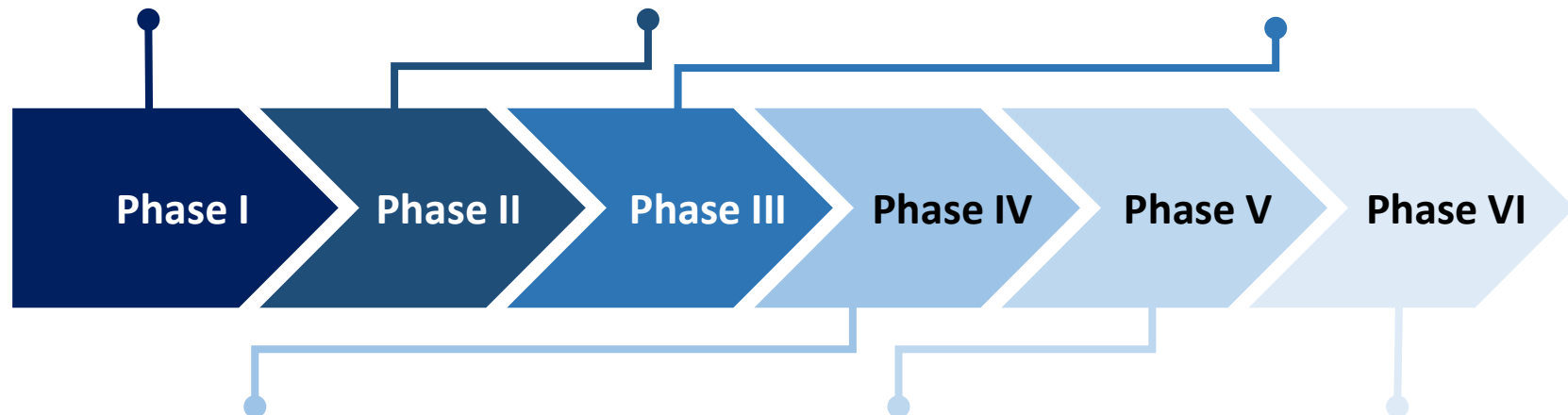
- Assemble coalition of lead agency and collaborators
- Obtain project seed funding

Staff and begin website

- Fill FTE position
- Contract with web design firm

Establish brand and structure

- Finish website, logo, and brand materials
- Begin onboarding initial region



Initiate mass messaging

- Plan grand opening
- Begin mass messaging campaign

Launch

- Official opening of trail

Grow and evolve

- Expand trail to new region(s)
- Generate revenue



Phase 1 (Year 1): Obtain seed funding



North Carolina Startup Expenses		
	Min	Max
Website		
Design and building	\$3,683	\$18,333
Hosting ¹	43	92
Content creation ²	908	1,722
Maintenance ¹	218	583
Total Website Expense	\$4,852	\$20,730
Trademark		
Design	\$230	\$693
Registration	258	367
Total Trademark Expense	\$488	\$1,060
Advertising		
Web (SEO)	\$1,833	\$9,167
Print		
Brochure ³	253	1,033
Newspaper ⁴	13,176	334,482
Magazine	21,633	320,000
National Radio ⁵	300	50,000
Total Advertising Expense	\$37,196	\$714,682
Miscellaneous		
Marketing Project Manager	\$36,000	\$112,000
Hub displays/exhibits	26,667	46,667
Total Miscellaneous Expense	\$62,667	\$158,667
Total Startup Expenses	\$105,203	\$895,139

Sources: See [appendix 3.1](#)

5/17/2018

¹Annual expense

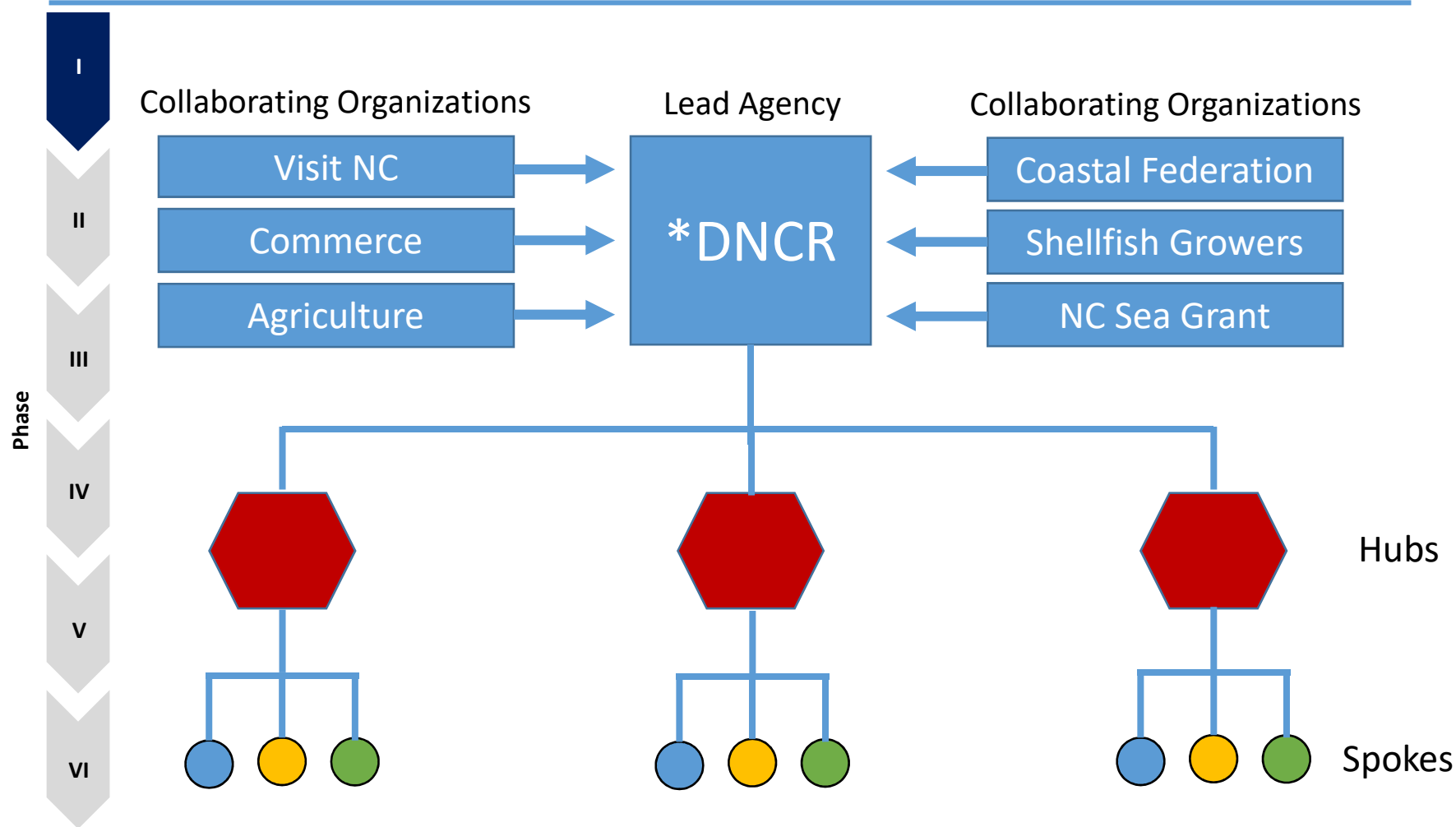
²Assumes approximately 5-7 pages of content

³Range based on 1,000 to 10,000 brochures

⁴Range based on ad size (B&W strip up to full page color)

⁵Assumes 100 ad plays

Phase 1 (continued): The Trail should be run by one lead agency with support from collaborating organizations and regional hubs



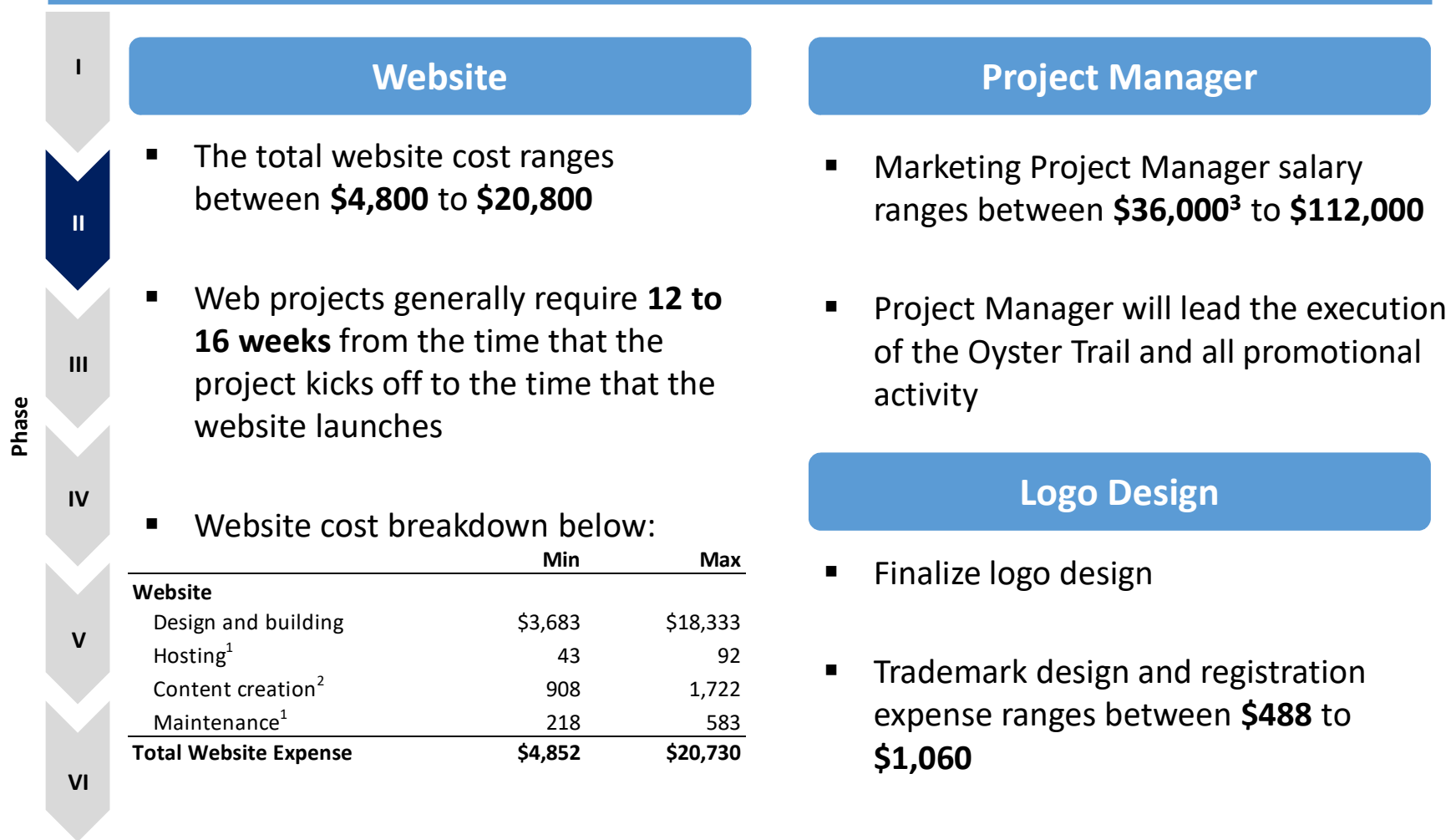


Phase 1 (continued): Lead agency and collaborating organizations will be jointly responsible managing and marketing the Trail





Phase 2 (Year 1): Begin website development and hire a permanent director of the Oyster Trail





Phase 3 (Year 1): Commence onboarding of initial region

Phase

I

II

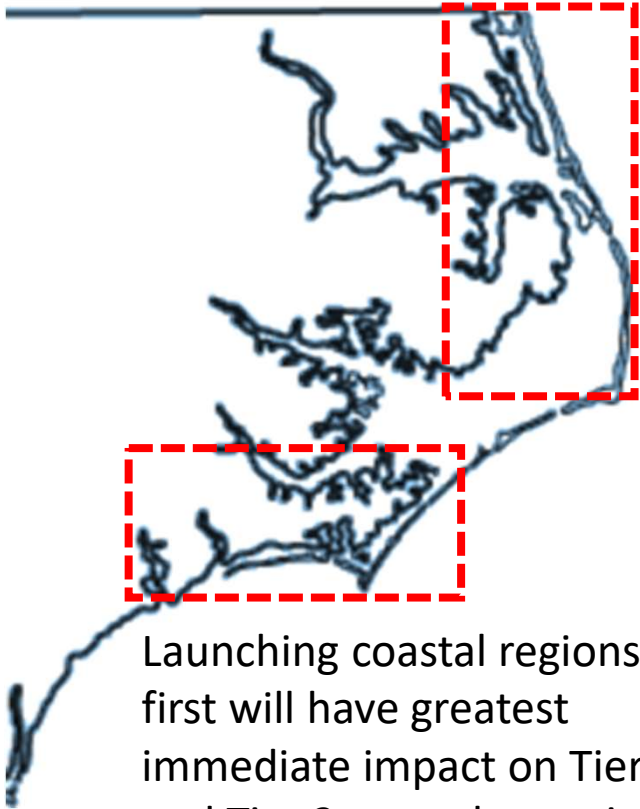
III

IV

V

VI


Regional Launch



Launching coastal regions first will have greatest immediate impact on Tier 1 and Tier 2 coastal counties

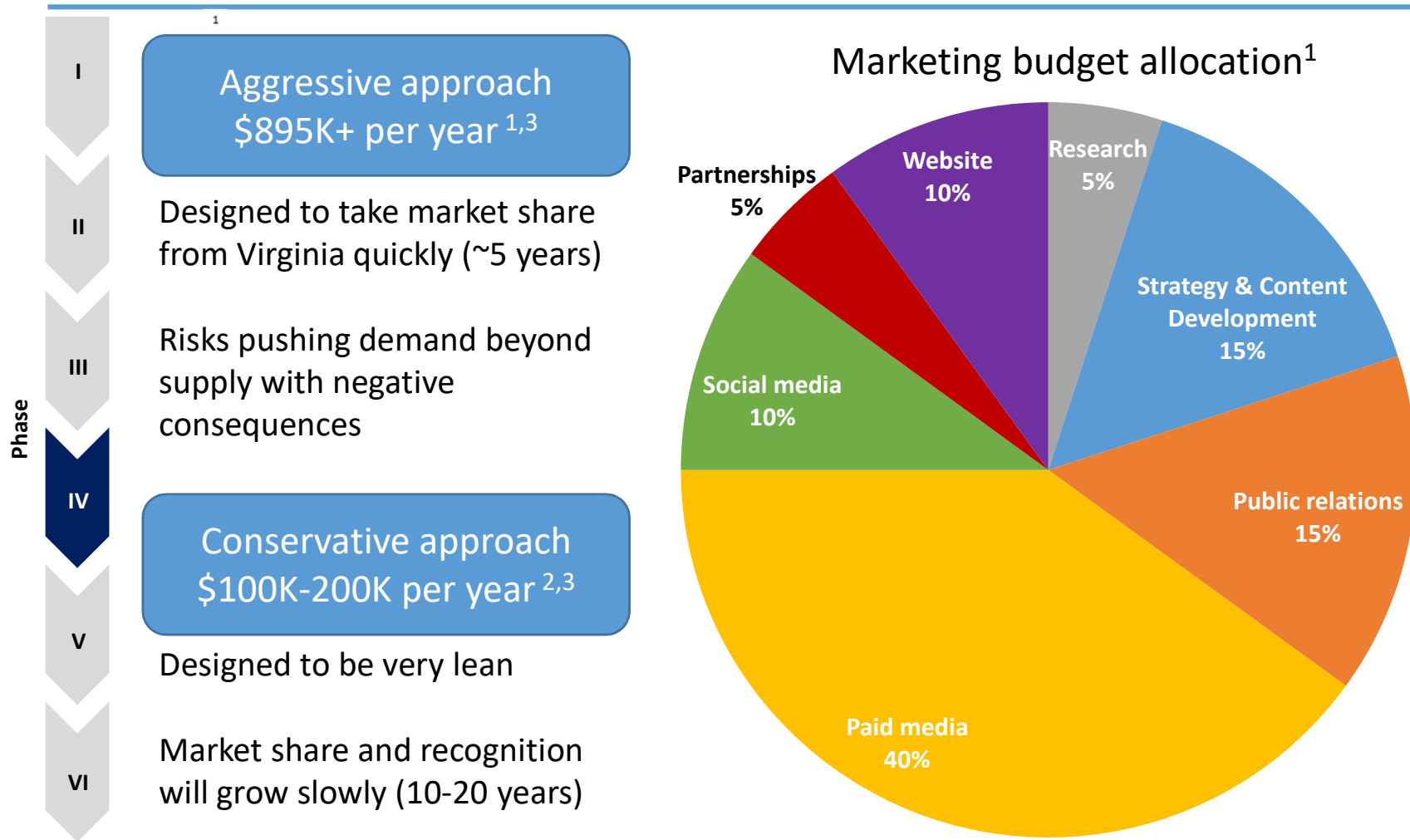
Hub Displays and Exhibits

- Costs range between **\$26,000 and \$46,000**
- Professional companies assemble all display materials in 6 to 12 weeks





Phase 4 (Year 1): Initiate marketing campaign



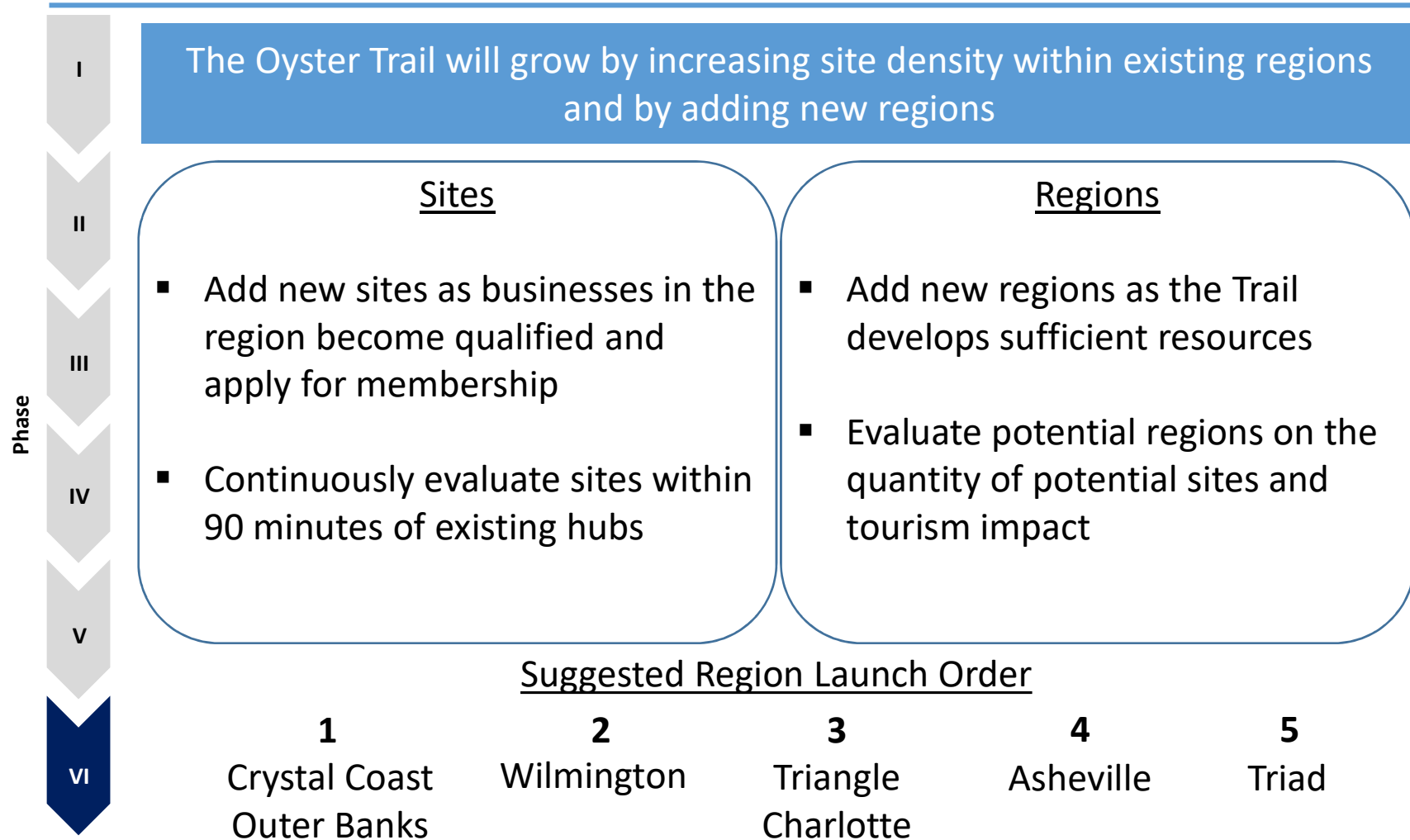


Phase 5 (Year 1): Launch the Trail with a grand opening celebration





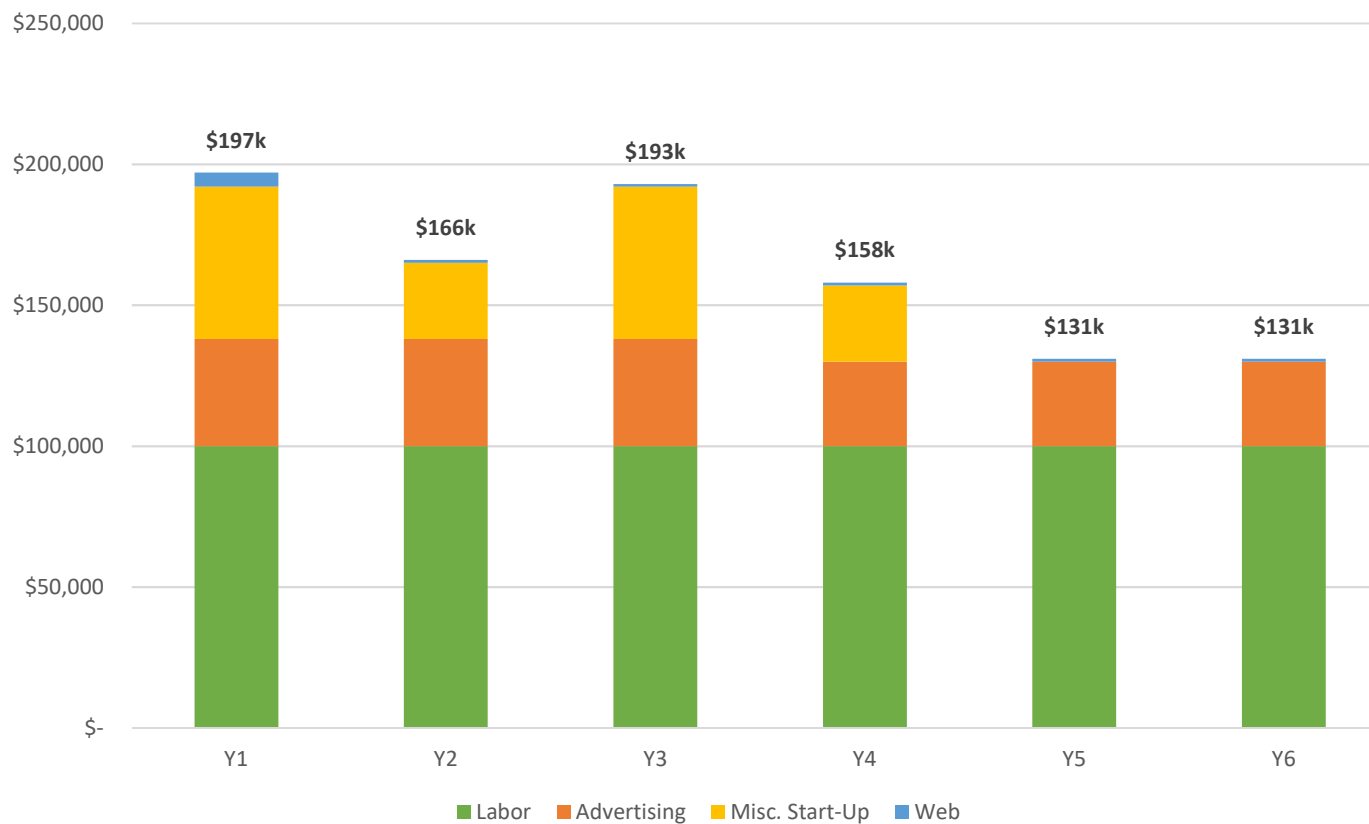
Phase 6 (Year 2 and beyond): Continuously add sites and evaluate geographic expansion annually





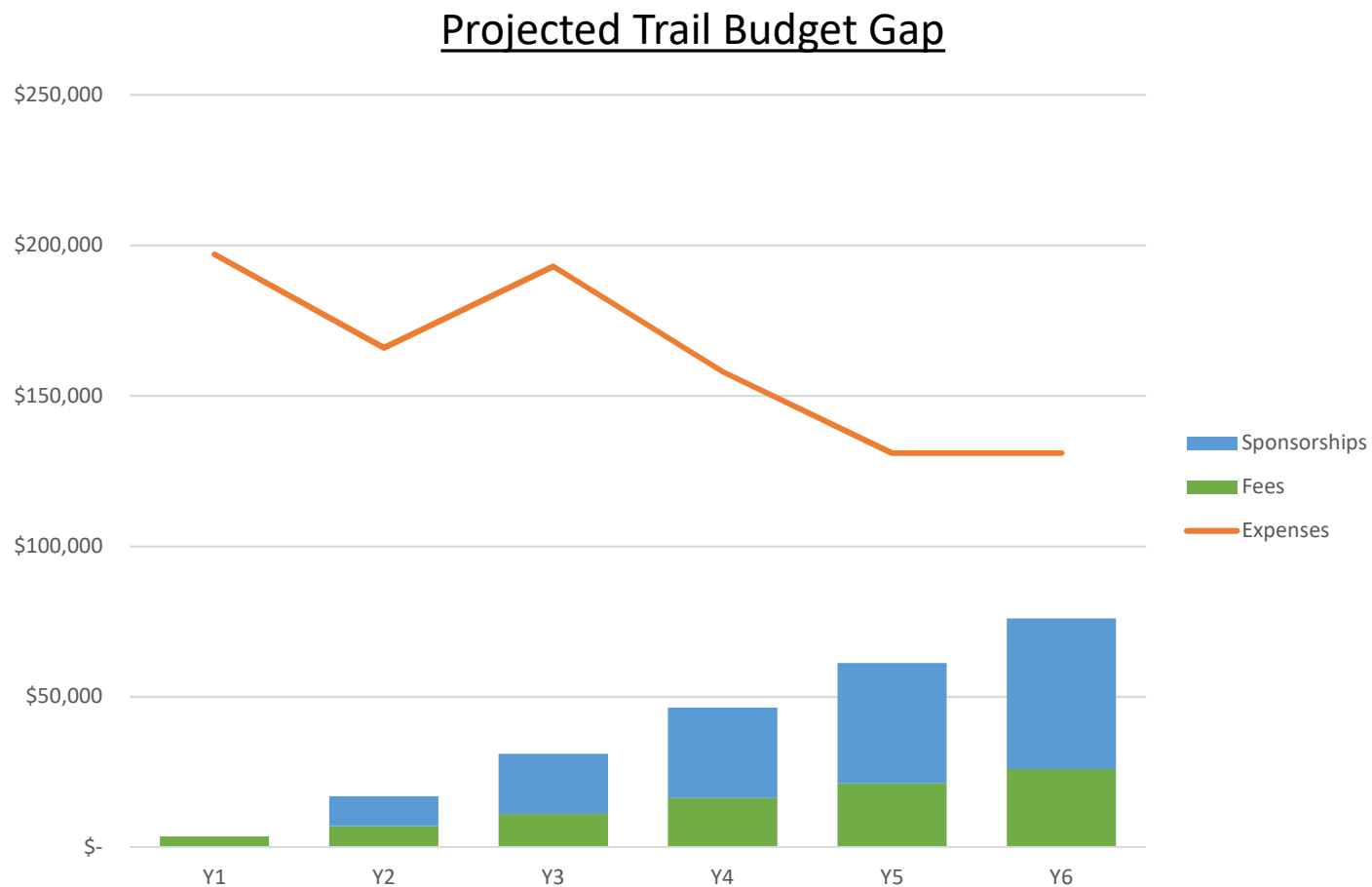
Annual expenses break down into labor, advertising, start-up and web design

Projected Trail Budget





Funding is needed to fill budget gaps in the Trail's early years





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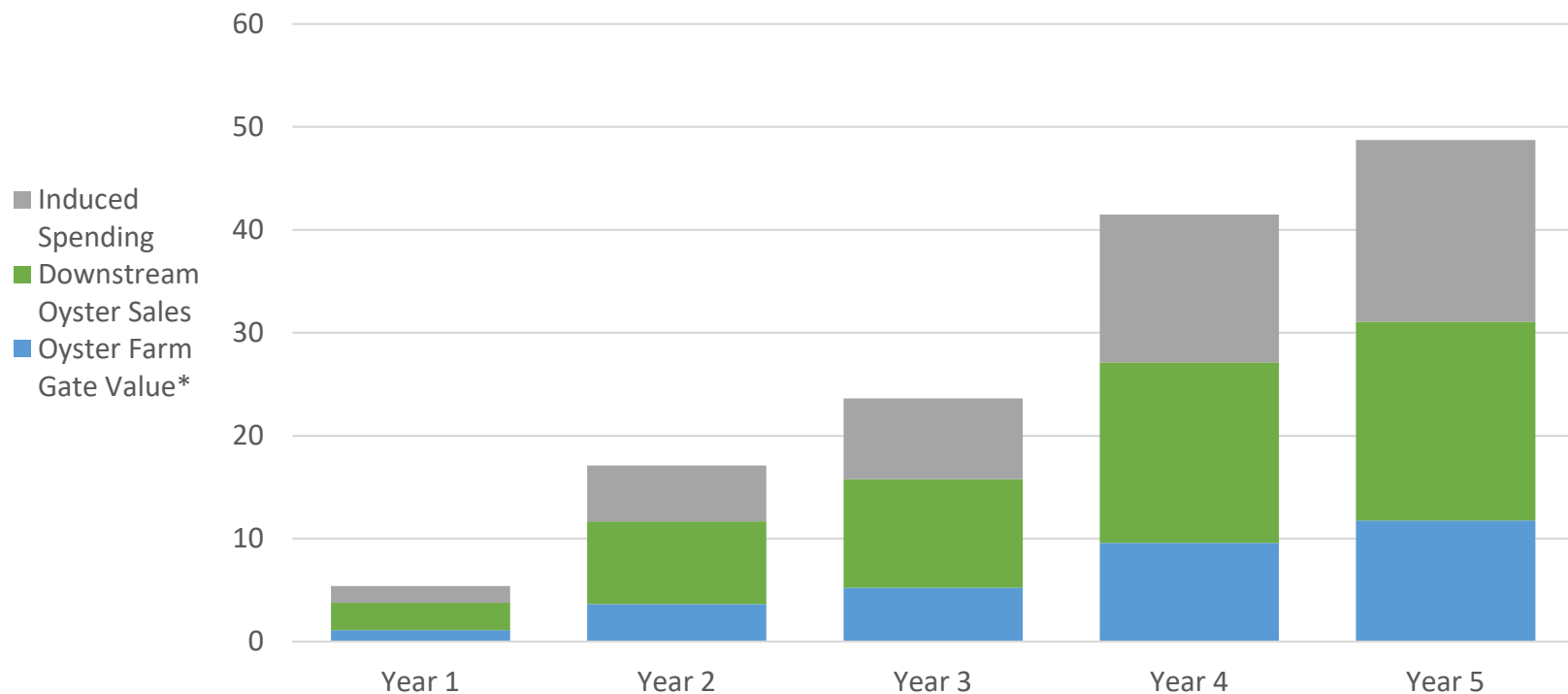
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Create measurable value



\$136 million in cumulative economic impact from oyster sales will be realized during the first five years

5-year Projected Economic Impact \$ millions

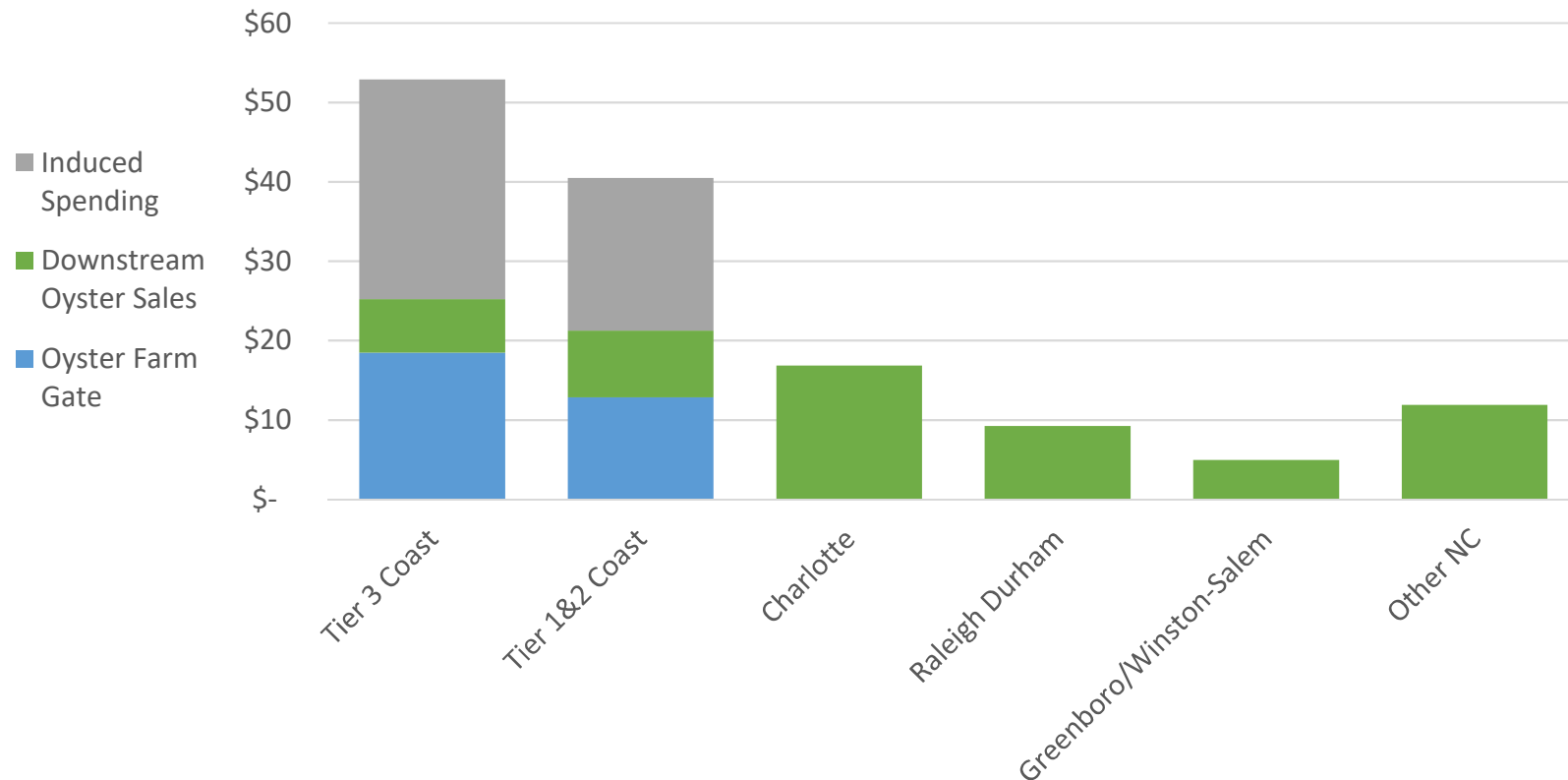


*Using current Sales of \$1.1 million for year 1



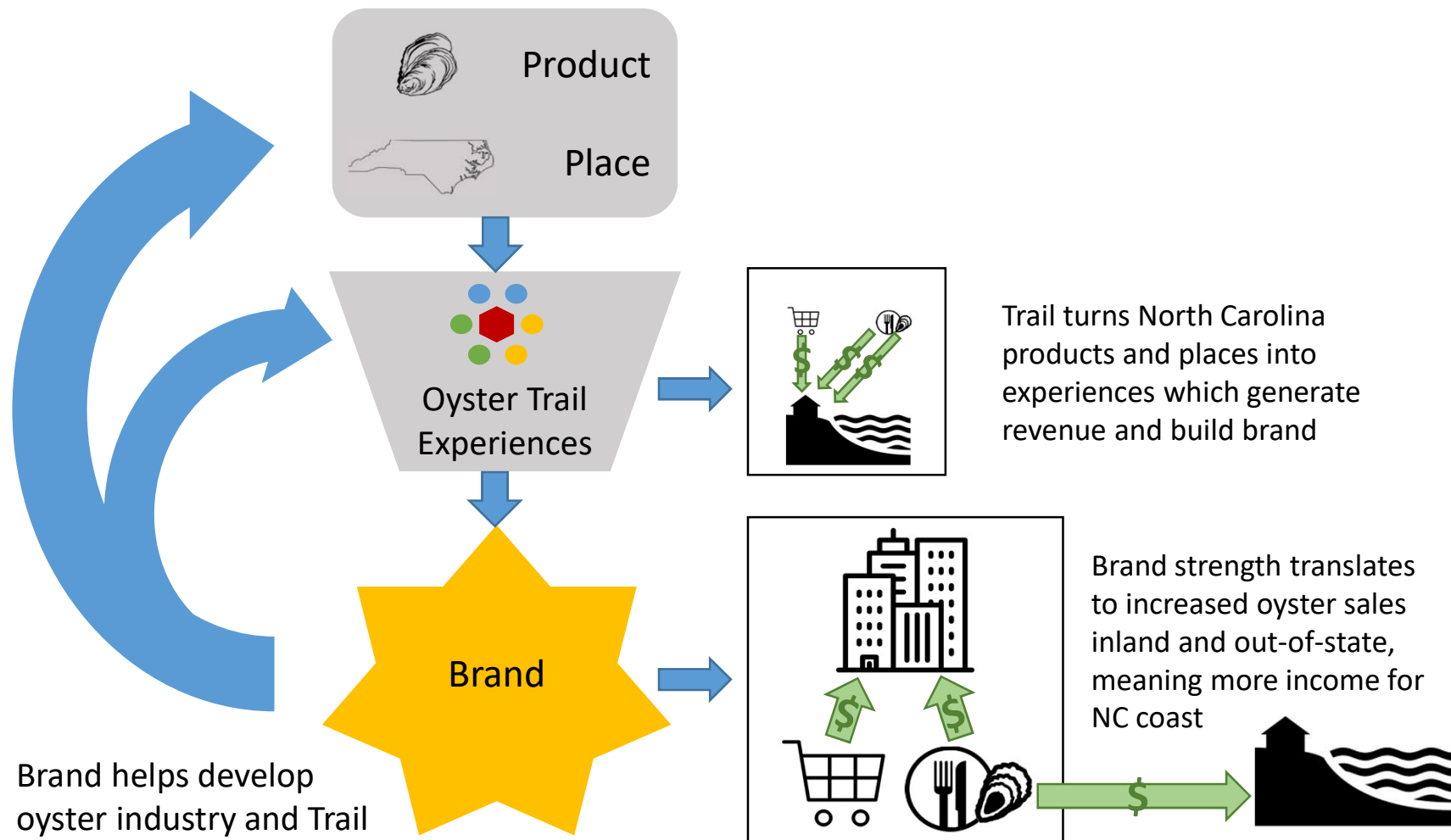
The majority of the economic impact from the trail will happen in coastal counties

Projected cumulative economic impact of Oyster Trail over 5 years \$ millions

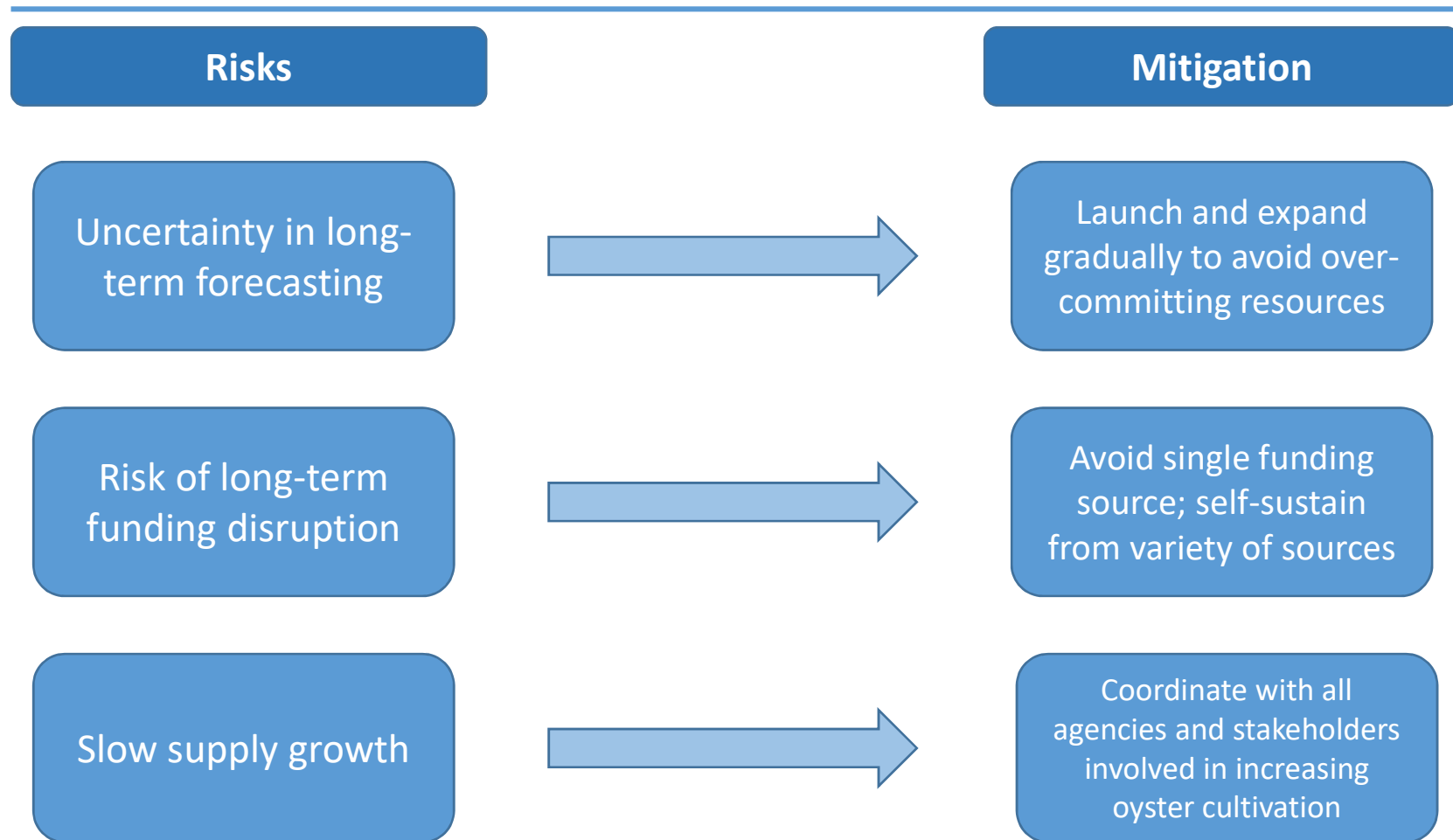




Building a North Carolina Oyster Trail, brand, and industry are related and reinforcing activities that provide economic value



Mitigation of risk factors will help ensure long-term success



The background of the slide is a close-up photograph of numerous oyster shells. The shells are piled together, showing various textures, colors (including white, grey, and brown), and shapes. Some shells are open, revealing the dark interior. The overall composition is dense and organic.

Appendix

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Oyster background

2

Marketing background

3

Budget models

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Market potential and forecasting models

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North Carolina Oyster Trail site experience

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Oyster Trail comparables

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Oyster festival

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Surveys



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Appendix 1.1: History of Oysters in NC

- In the mid-1800s, NC was an oyster mecca – as the state grew, so did the demand for the mollusks
 - The state began legislating the harvest of oysters in 1822
 - In 1858, a new law awarded fishing rights to citizens who enclosed, seeded and harvested estuarine ground for oyster farming
 - Oystermen created 52,000 acres of private oyster gardens in the three decades that followed
- By the late 1880s, oysters from North Carolina were being harvested at unprecedented rates and shipped by boxcar to San Francisco and New York
 - Maryland and Virginia had greatly depleted the natural oyster beds in the Chesapeake Bay, causing out-of-state canneries to open oyster houses in North Carolina (and thus irresponsible harvesting practices, such as illegal dredging)
 - In 1891, legislature declared “war” on out-of-state harvesters who collected oysters with motorized dredges leading to a period now called the “Oyster War of 1891”
- Returning to hand-harvest-only management and limited dredging resulted in declines in oyster harvest and the closing of many of the canneries

UNLOADING OYSTERS AT DOCK, NEW BERN, N. C.

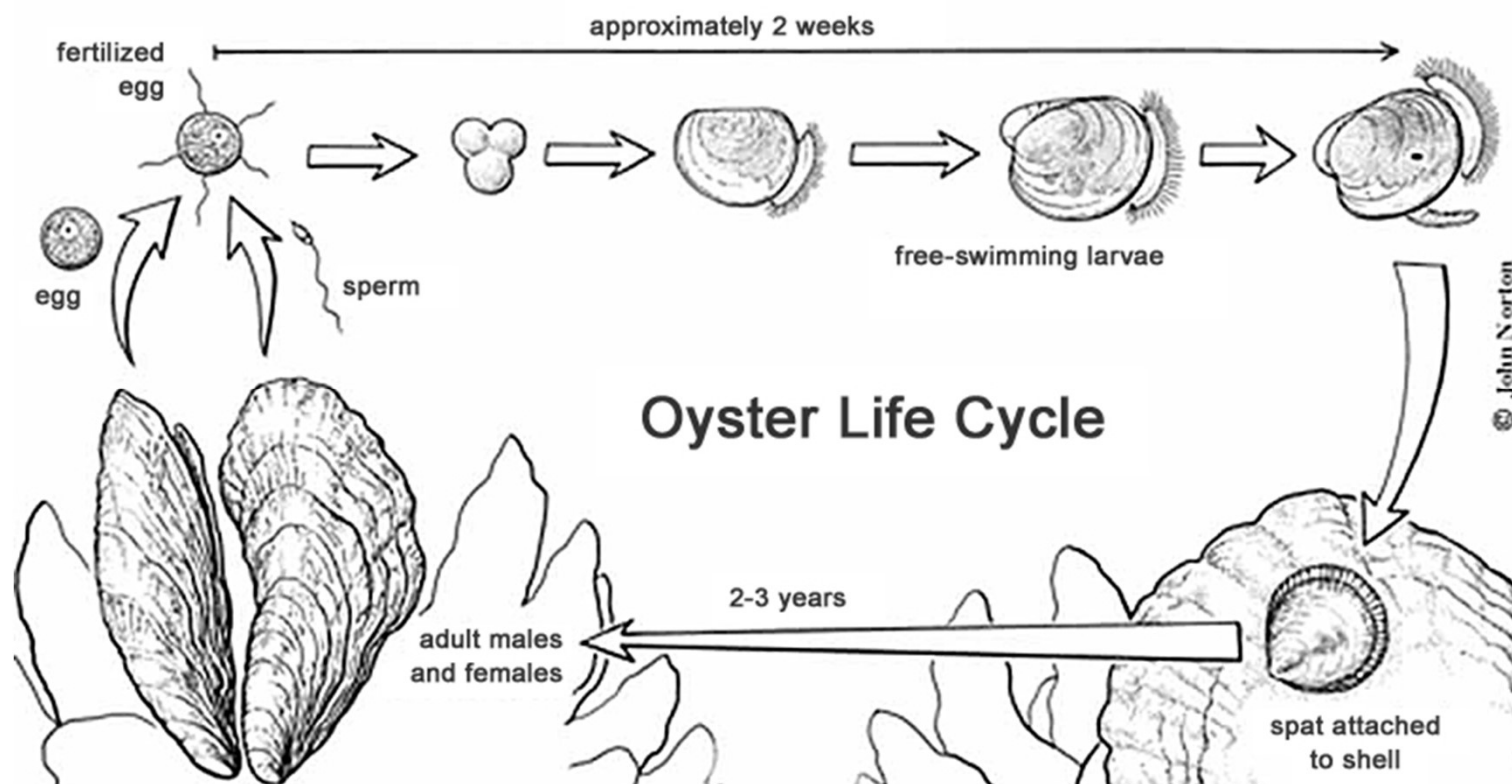


Appendix 1.1: History of Oysters in NC (cont'd)

- Oyster landings reached the highest level on record in 1902 at 806,363 bushels... but have steadily declined since
- In the early twentieth century, the General Assembly passed laws reinstating the commercial dredging season and defining areas for (and limits on) oyster harvesting
- Throughout the twentieth century, oyster landings decreased as harvest limits remained:
 - taking too much shell from the water (over-harvest)
 - natural disasters
 - shellfish diseases
 - unsuitable water quality
- As a result, North Carolina has lagged behind Virginia and Maryland for oyster production



Appendix 1.2: Oyster Lifecycle – An Illustration





Appendix 1.3: Diploids vs. Triploids

- Natural oysters are **diploids**—each of their cells contains two sets of chromosomes, one from each parent
- Most farm-raised oysters are **triploids**, meaning that they have three chromosomes
 - Invented by Standish Allen, currently the director of the Aquaculture Genetics and Breeding Technology Center at William & Mary’s [Virginia Institute for Marine Science](#)
- The uneven number of chromosomes results in a mostly infertile oyster that grows bigger and faster than natural oysters, because it doesn’t waste energy producing eggs and sperm). Benefits:
 - Can be harvested earlier
 - Less susceptible to disease
 - Can be marketed year-round, including “r-less” summer months
- Even though most oysters produced today are still diploids, the bulk of them are shelled and incorporated into canned / processed oyster products



Appendix 1.4: Cultivation

- Oysters naturally grow in estuarine (partially enclosed coastal) bodies of brackish water (less saline than salt water). When farmed, the temperature and salinity of the water are controlled / monitored, so as to induce spawning and fertilization (if diploids) or rapid maturation (if triploids).
- Once oysters reach seed or spat stage (often in a hatchery), three methods of cultivation are commonly used:
 1. Distributed over existing oyster beds and left to mature naturally. Such oysters are then collected using the methods for fishing wild oysters, such as dredging.
 2. Put in racks, bags, or cages (or glued in threes to vertical ropes) which are held above the bottom. Oysters may be harvested by lifting the bags or racks to the surface and removing mature oysters, or simply retrieving the larger oysters when the enclosure is exposed at low tide.
 - The latter method may avoid losses to some predators, but is more expensive.
 3. Placed in a cultch within an artificial maturation tank. The maturation tank may be fed with water that has been especially prepared for the purpose of accelerating the growth rate of the oysters.
 - This method = least susceptible to predators and poaching, but is the most expensive to build and to operate.



Appendix 1.4: Cultivation – Pictures

Distributed over existing oyster beds



Placed in a cultch within an artificial maturation tank



Put in racks, bags, or cages (or glued in threes to vertical ropes)





Appendix 1.5: Oyster Mariculture and Restoration

Cultch Planting

- Deposits of oyster shell, marine limestone and/or clam shell — collectively called “cultch” — in shellfish waters are colonized by wild oyster spat
- Cultch planting sites open to public harvest once oysters reach legal harvest size

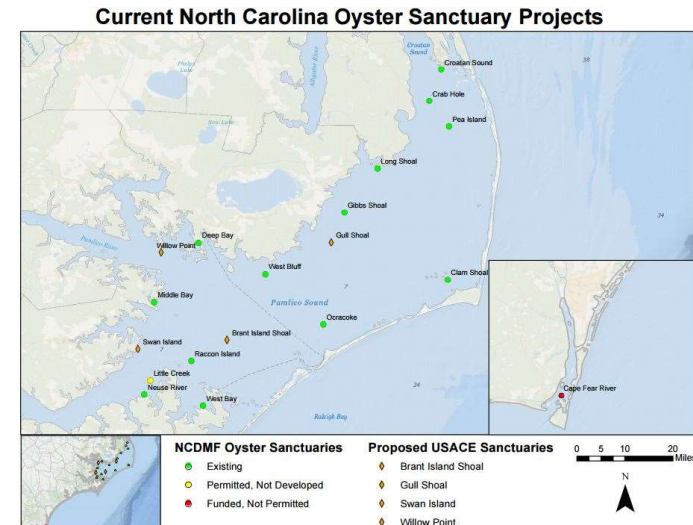


Oyster Farming

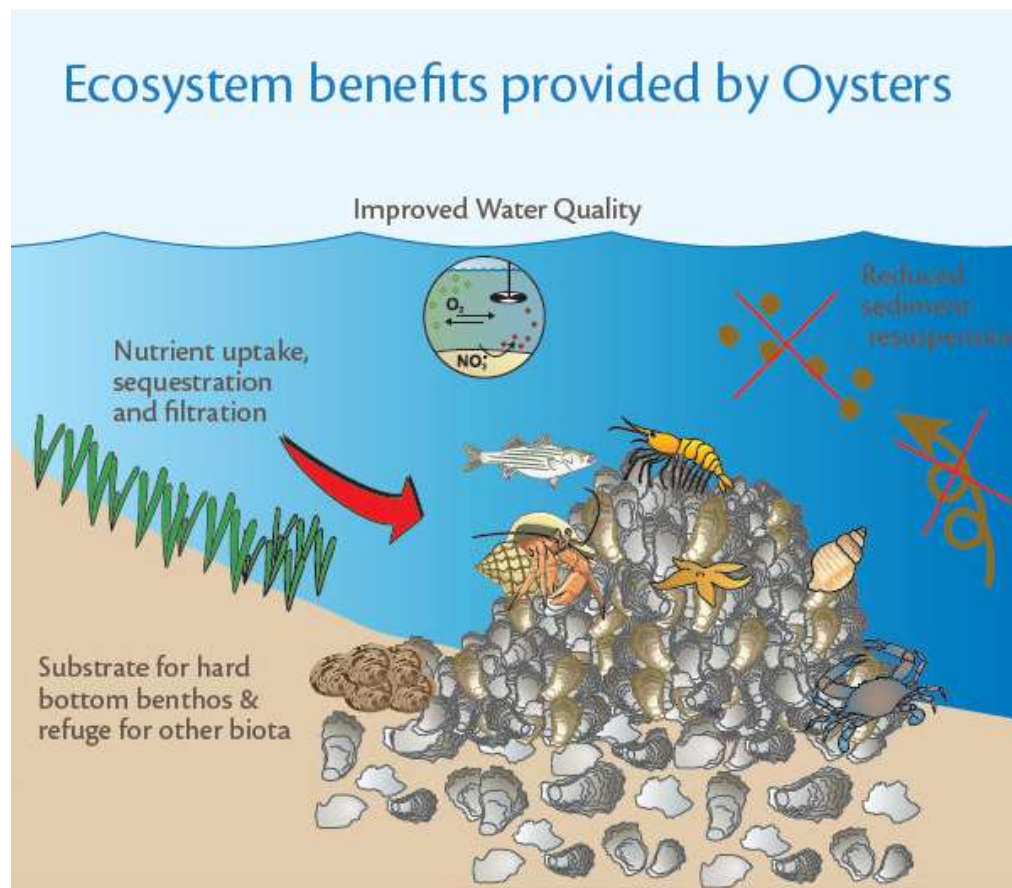
- More oysters in NC waters = increased water filtration
- Additional habitat for other fish and sea creatures and plants (nitrogen sequestration)
- Spur local economy and support year-round triploid cultivation

Sanctuaries

- Constructed throughout NC’s sounds and designed to improve wild stock
- Serve as marine-protected areas that are typically closed to oyster harvest, but open to hook and line fishing



Appendix 1.6: Ecosystem Services of Oysters



- Oysters filter organic and inorganic particles from the water, positively impacting other species in their mariculture ecosystem.
- Oysters can selectively choose and feed on microscopic algae, removing algal biomass from the ocean and improving overall water quality.
- In wild reefs, the presence of oyster shells creates a hard bottom substrate that provides habitat, shelter and spawning beds for other bay organisms



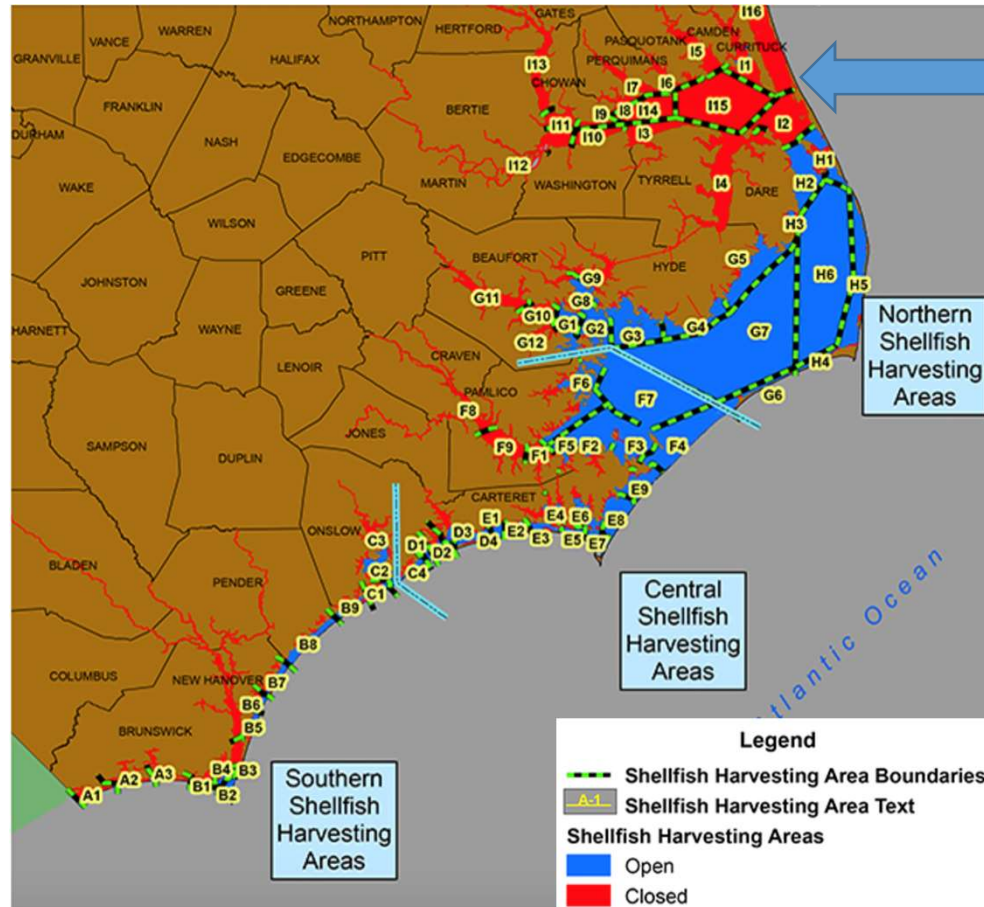
Appendix 1.7: The NC Difference: “To eat an oyster is to taste a place”

- *Crassostrea virginica*, or the Eastern / Atlantic Oyster, is North Carolina’s native species
 - Tend to be brinier than the other four species, with a crisp texture, clean flavor, mineral accent and savory finish
- NC’s northern coastal inlets creates a unique flavor profile different from other Eastern oysters:
 - The brackish waters found in **Stump Sound** and **Topsail Sound** loiter and drift, and are free from the turbulence of deeper currents
 - This allows oysters to grow long and leggy, and the higher salinity in the water lends to a saltier taste
- Other popular NC oysters hail from Lockwoods Folly, Masonboro Sound, Shallotte River and Newport River





Appendix 1.8: Current oyster leases and expansion limitations



Note that Albermarle Sound is closed to oyster production. The salinity in Albermarle is too low for oysters. This limits the impact of oyster production on many Tier 1 and Tier 2 counties located in this region.

As of February 2014, there were 172 shellfish leases encompassing 1179 acres and 50 shellfish franchises ...Fourteen shellfish water column operations existed within 37 acres of leased or franchised bottom. - NCDENR

Restrictions include ensuring the lease is multi-use, paid for, and produces a minimum number of oysters



Appendix 1.9: Stakeholders, experts, and collaborators list (not exhaustive)

State agencies

- Department of Natural and Cultural Resources
- Department of Agriculture
- Department of Commerce
- Department of Environmental Quality
- Division of Marine Fisheries

Fishing/shellfish industry

- North Carolina oyster harvesters
- North Carolina oyster growers
- Commercial fishermen
- North Carolina Shellfish Growers Association
- Harvesters/growers of other shellfish
- Finfish aquaculture growers

Communities

- Rural coastal communities and organizations
- Coastal property owners, boaters, and hunters

Business and Tourism

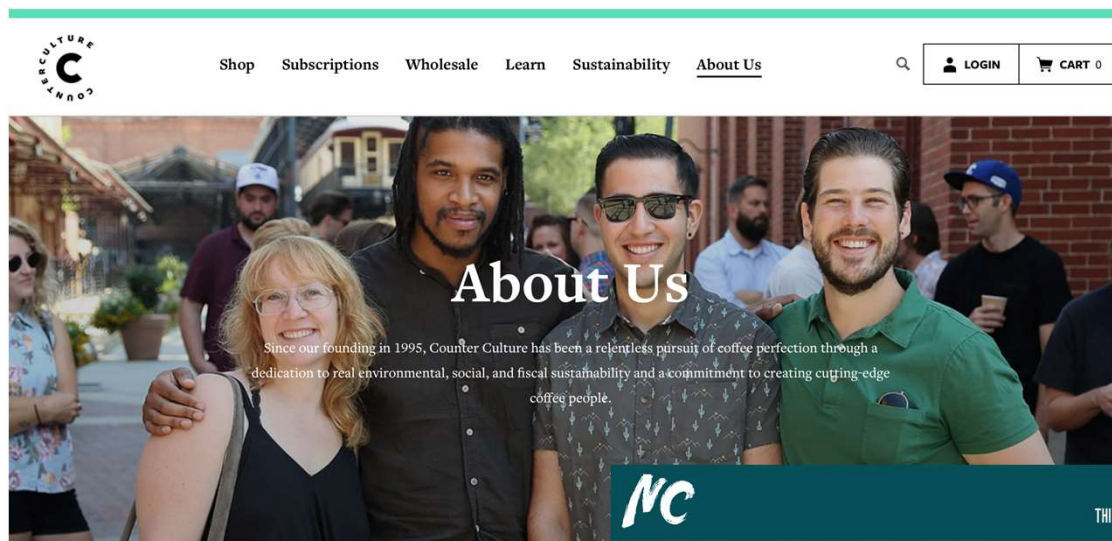
- Lodging and accommodation providers
- NCRLA
- North Carolina food and beverage establishments
- Food distributors
- Tour operators
- Visit NC
- Local tourism offices
- Local chambers of commerce

Research and Conservation

- North Carolina Coastal Federation
 - NC Sea Grant
 - UNC-CH Institute of Marine Sciences
-



Appendix 2.1: Websites to emulate

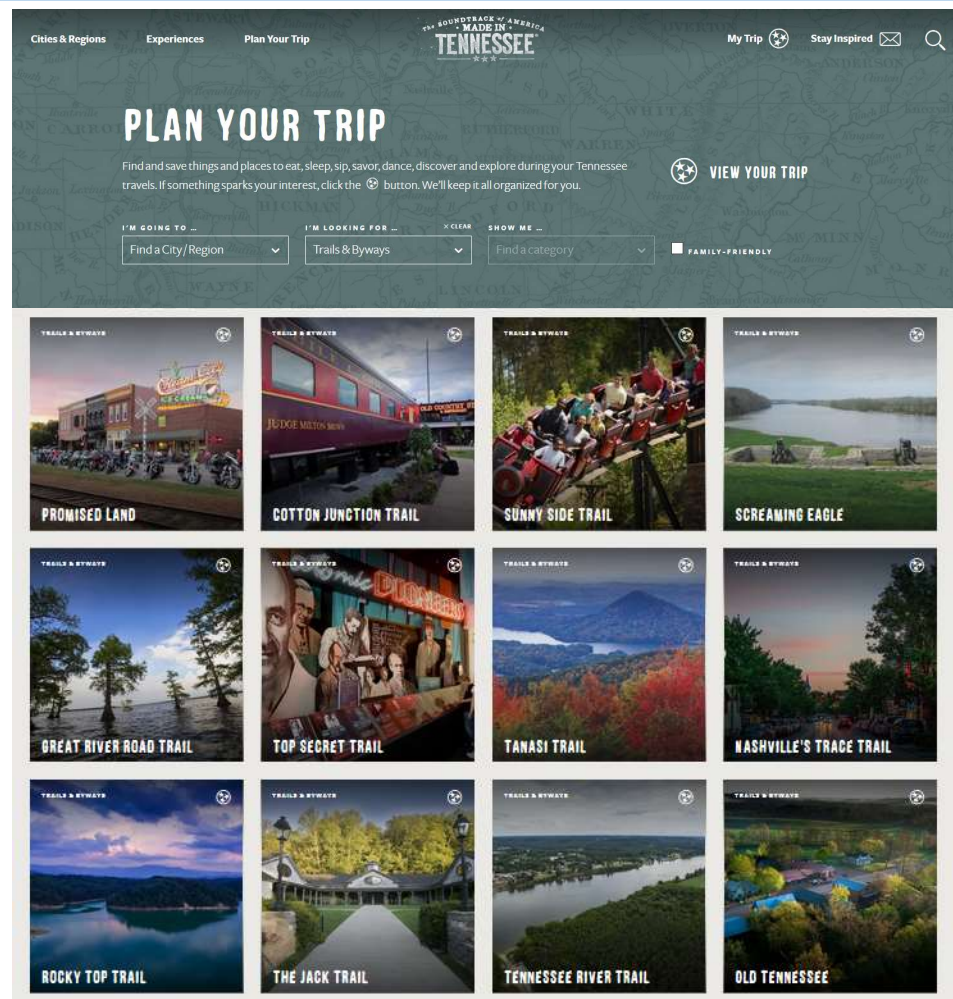


Visit NC and Counter Culture Coffee websites provide good examples of clean, visual, meaningful websites





Appendix 2.1: Discover Tennessee Trails and Byways site—links to many Tennessee visitor trails





Appendix 2.1: Discover Tennessee Trails and Byways site—Rocky Top Trail

EXPLORE THE TRAILS

DISCOVER TENNESSEE TRAILS & BYWAYS

ROCKY TOP

TRAIL ROCKY TOP TRAIL

GENERAL AREA KNOXVILLE

STOPS 130

POINTS OF INTEREST

All

GATLINBURG / GREAT SMOKY MOUNTAINS NATIONAL PARK WELCOME CENTER
POINT OF INTEREST
Stop here for great information about the Great Smoky Mountains National Park.

SWEET FANNY ADAMS THEATRE
ARTS
Ready for a laugh? This hysterical vaudevillian live comedy show is the longest running theatrical attraction in Gatlinburg. Shows nightly, April-Dec.

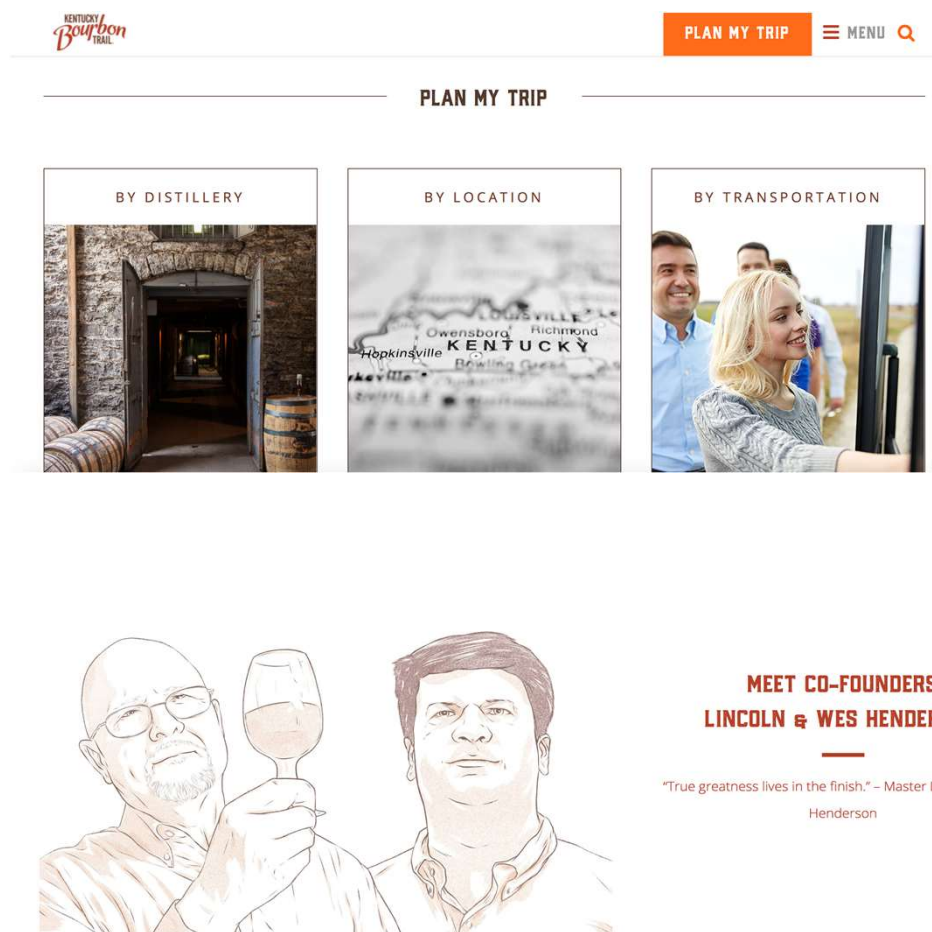
ARROWMONT SCHOOL OF ARTS & CRAFTS
ARTS
The five galleries of this nationally recognized center for contemporary arts and crafts are popular stops for tourists and collectors alike. Check out the center's class schedule and return to hone your skills with the staff and

RIPLEY'S AQUARIUM OF THE SMOKIES
POINT OF INTEREST
Get up close and personal with a shark and a giant sea

Map data ©2018 Google. 15 km



Appendix 2.1: The Kentucky Bourbon Trail is a great example for potential website sections

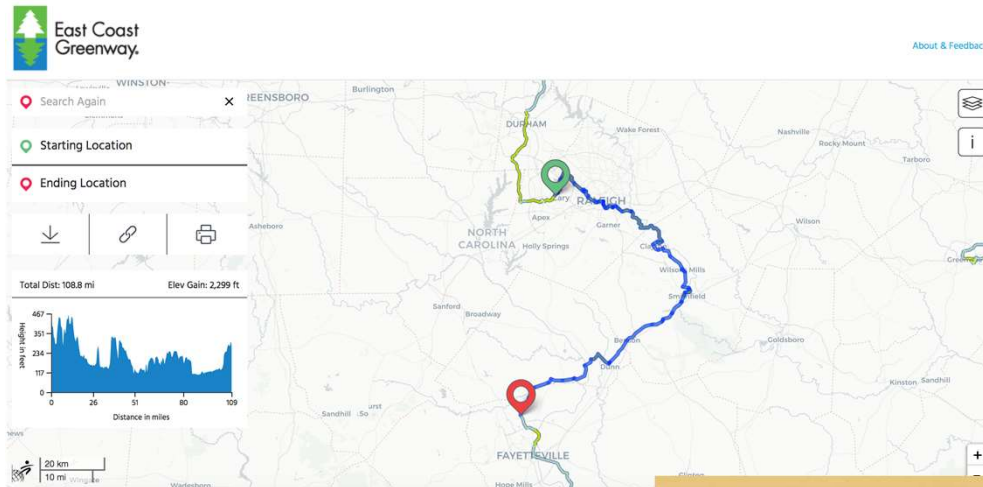


The Kentucky Bourbon Trail has numerous maps, a 'plan your visit' page, plentiful information of the site locations including media content, and an about section with educational, storytelling information





Appendix 2.1: Other examples for potential website sections









Map and “Plan Your Trip” feature

Information section for
participating and
prospective sites –
Weaver Street Market

For Our Owners

Keeping connected with our owners is important! Here you'll find the latest information on specials and owner news plus links for updating your information and downloading important owner documents.

 Owner Specials Click for this week's Owner Specials.	 Owner Benefits Learn about our many owner benefits	 Owner Documents Many useful documents and forms for new and existing owners
 Update Your Info How to update the contact information on your account	 Latest Owner News Read about the co-op and our board.	 Feedback We want your feedback! Click here to get in touch with us



Appendix 2.2: Keep in mind key success factors to get the most out of the website:

- **Fast Loading** -- No one wants to wait (and wait and wait) for your site to load. Design sites with prompt loading times for all users on all devices (even the ones with slower Internet connections). You can use Pingdom or Pagespeed Insights by Google to check your website speed and see how you can improve.
- **Mobile Ready** -- Virtually everyone uses smart devices on a daily basis. Create an engaging, mobile-friendly design that your audience can access whenever they want, wherever they roam.
- **Tracking Enabled** -- Analytics matter - it's the best way to determine that your website is actually doing its job. The final design should include functionality to gauge key indicators such as traffic, goals, and conversions.
- **Visual appeal** – Tasteful imagery and a creative layout can reveal quality in the NC oyster brand and entice user interest.
- **Frequently updated**



Appendix 2.3: The NC Oysters logo should be simple and differentiated



Other logos lack color/creativity or are difficult to see/read:



A good logo is:

- Easily recognizable
- Memorable
- Appropriate
- Versatile
- Timeless
- Meaningful

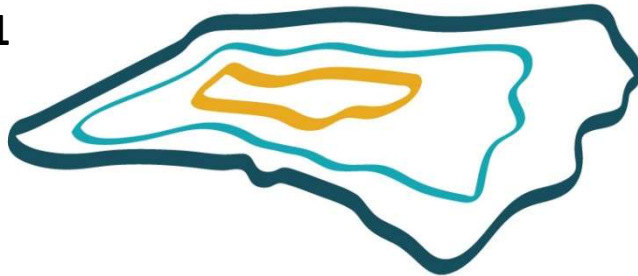


Source: Journal of Business Research 2014 "A study of the antecedents of slogan liking"



Appendix 2.4: Potential North Carolina Oysters Logos

1



NORTH CAROLINA OYSTERS
— GOT TO BE N SEA —

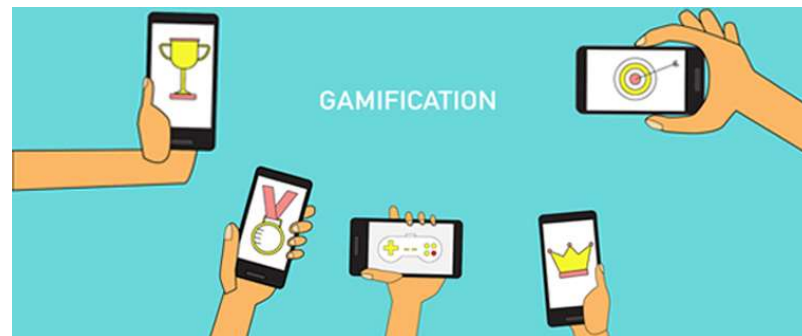
2

NORTH CAROLINA  OYSTERS
A SOUND CHOICE



Appendix 2.5: Gamification 101

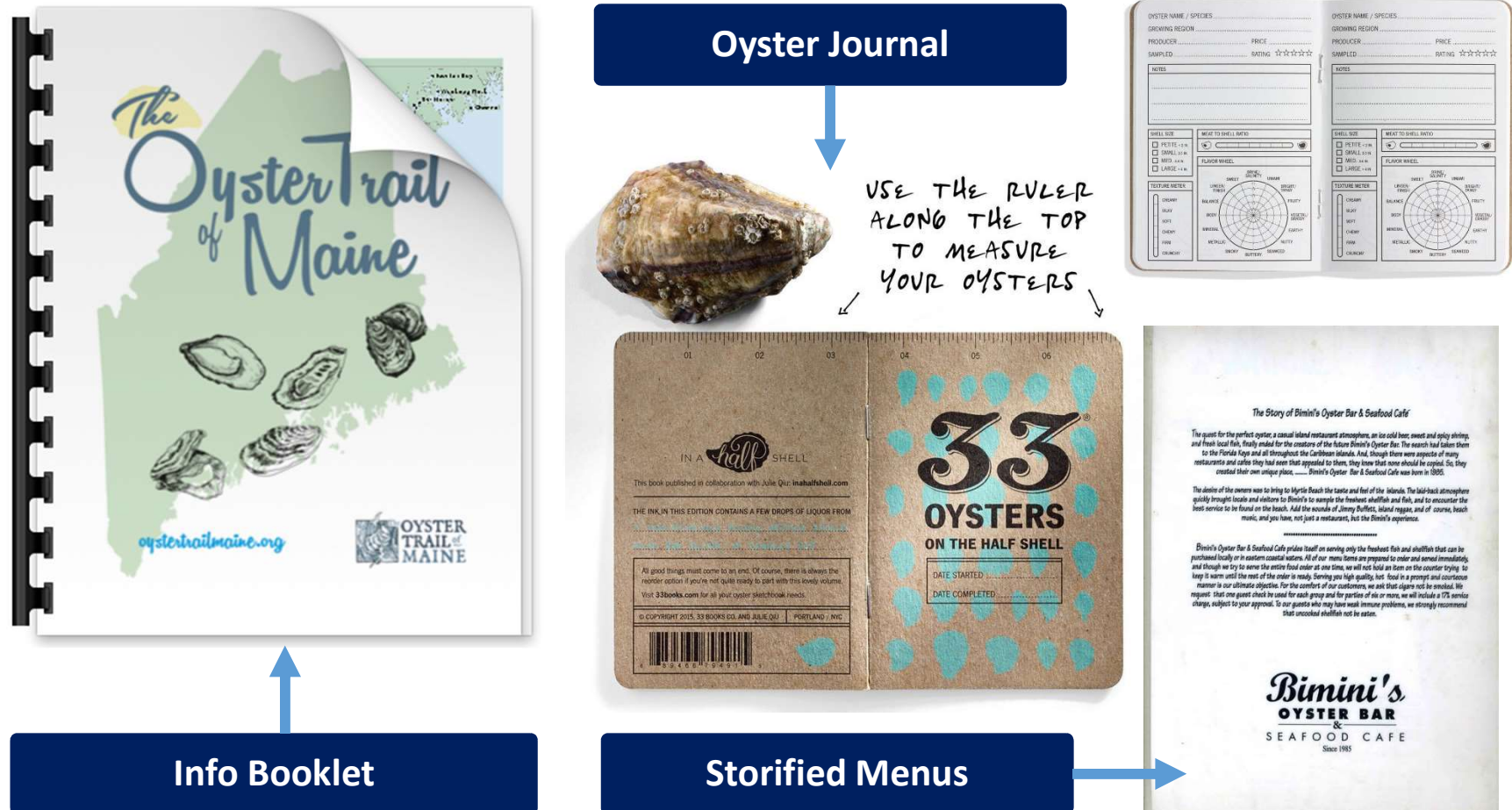
- “Gamification” is the process of taking something that already exists – a website, an enterprise application, an online community – and integrating game mechanics into it to motivate participation, engagement, and loyalty.
- In the last decade, gamification has grown rapidly and spread throughout almost every field, including education, manufacturing, retail, food services and healthcare. The global gamification market is expected to reach \$5.5 billion in 2018 to over \$11 billion by 2020
- For **consumers**, gamification allows for better engagement with purchases, increases value creation, enhances services, and builds a relationship between buyer and seller. For **businesses**, gamification incentives consumers to spend more.
- 87% of retailers plan to use gamification as a way to increase consumer engagement within the next five years.



Source: Macrothink Institute, “Business and Economic Research,” 2017



Appendix 2.5: Additional approaches to gamification





Appendix 2.6: Mobile app

Developing a North Carolina Oyster Trail mobile app could provide many advantages:

- Trail visitors could take an easy-to-use mobile version of the Oyster Trail website, along with its mapping features, Trail site information, and other features with them as they visit Trail sites
- Printed promotional materials like Trail passports could be digital, thus avoiding printing costs
- Notifications based on geographic location could be used to alert visitors when they are near trail sites
 - This could be helpful in “cross-pollinating” inland and coastal sites—if an inland resident downloads the app to visit oyster trail sites in their city and then visits the coast, or vice versa
 - Consider *History Here* app as an example of this
- It could also be integrated with social media to help visitors share their photos and experiences on the trail to Facebook, Instagram, and others

Please note that no funding for app development is included in our budget estimates

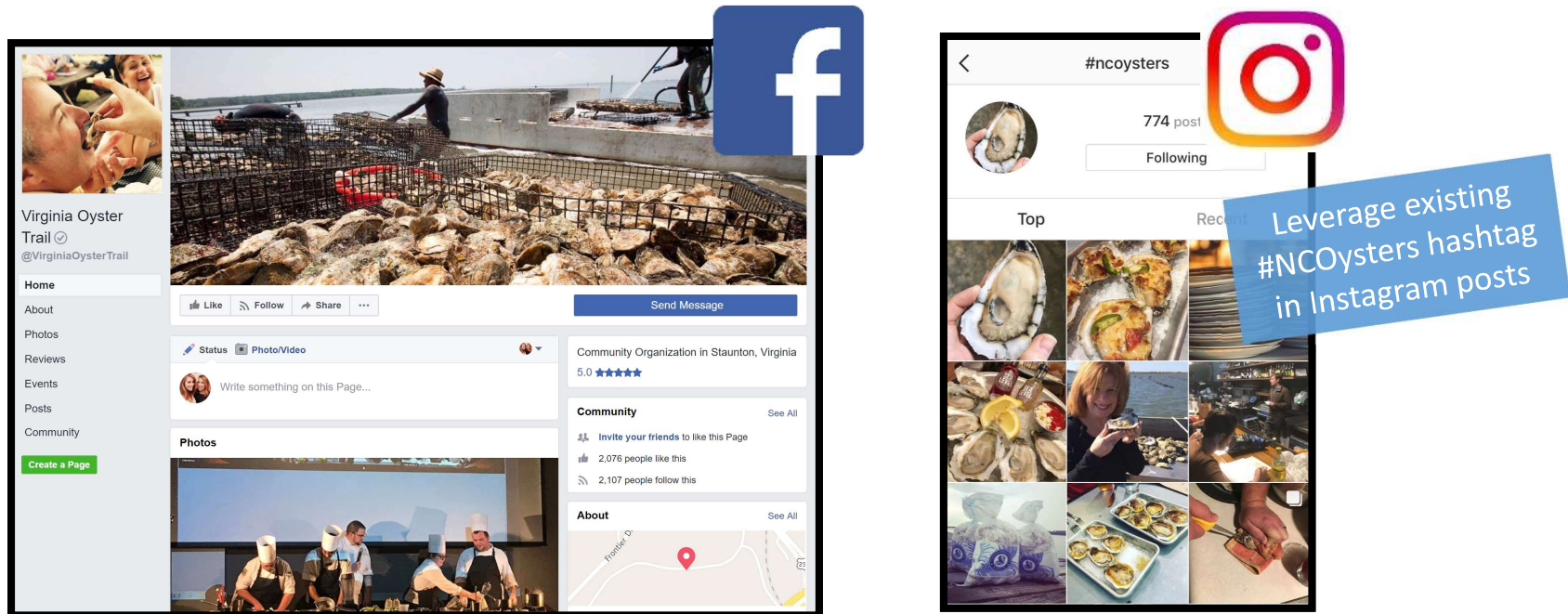


Appendix 2.6: Discover Tennessee Trails and Byways app





Appendix 2.7: Social media



Tapping into social media can organically help grow NC Oyster Trail efforts while providing a platform for consumers to engage with the NC Oysters brand.

- 61% of consumers say reviews on social media influence their buying decisions
- 68% of people look to Facebook when purchasing products
- 80% of Instagram users follow a business on the platform

Appendix 3.1: Cost estimates for Year 1

Website Expense

Design and building		
Source	Min	Max
ATILUS, LLC	\$3,500	\$30,000
Lifewire	\$2,050	\$10,000
Best Website Builder Reviews	\$5,500	\$15,000
Mean	\$3,683	\$18,333
Median	\$3,500	\$15,000

Hosting		
Source	Min	Max
HostGator	\$36	\$132
1&1	\$12	\$96
GoDaddy	\$12	\$96
InMotion	\$36	\$96
Hostwinds	\$54	\$54
Bluehost	\$35	\$96
HostMonster	\$83	\$83
JustHost	\$72	\$84
Mean	\$43	\$92
Median	\$36	\$96

Content creation		
Source	Min	Max
Content Launch	\$475	\$665
The Content Factory	\$2,000	\$4,000
Best Website Builder Reviews	\$250	\$500
Mean	\$908	\$1,722
Median	\$475	\$665

Maintenance		
Source	Min	Max
Maintaingo	\$35	\$300
WebpageFX	\$119	\$449
Best Website Builder Reviews	\$500	\$1,000
Mean	\$218	\$583
Median	\$119	\$449

Advertising Expense

Web (SEO)		
Source	Min	Max
RankPay	\$1,000	\$7,500
Search Engine Land	\$500	\$10,000
WebpageFX	\$4,000	\$10,000
Mean	\$1,833	\$9,167
Median	\$1,000	\$10,000

Brochure		
Source	Min	Max
Print Place	\$210	\$800
VistaPrint	\$350	\$1,400
UPrinting	\$200	\$900
Mean	\$253	\$1,033
Median	\$210	\$900

Newspaper		
Source	Min	Max
Washington Post	\$20,428	\$163,422
USA Today	\$16,900	\$485,200
WSJ	\$2,200	\$354,823
Mean	\$13,176	\$334,482
Median	\$16,900	\$354,823

Magazine		
Source	Min	Max
Entrepreneur Media	\$500	\$500,000
WebpageFX	\$500	\$250,000
Inc. Media Kit	\$63,900	\$210,000
Mean	\$21,633	\$320,000
Median	\$500	\$250,000

National Radio		
Source	Min	Max
WebpageFX	\$300	\$50,000
GoArticles.com	\$300	\$50,000
Mean	\$300	\$50,000
Median	\$300	\$50,000

Trademark Expense

Design		
Source	Min	Max
Deluxe Enterprise Operations	\$200	\$500
99designs	\$300	\$1,300
Thumbtack	\$190	\$280
Mean	\$230	\$693
Median	\$200	\$500

Registration		
Source	Min	Max
LegalZoom	\$275	\$375
USPTO	\$225	\$400
WSJ	\$275	\$325
Mean	\$258	\$367
Median	\$275	\$375

Miscellaneous Expense

Marketing Project Manager		
Source	Min	Max
Glassdoor	\$54,000	\$118,000
Payscale	\$37,000	\$92,000
Indeed	\$17,000	\$126,000
Mean	\$36,000	\$112,000
Median	\$37,000	\$118,000

Hub displays/exhibits		
Source	Min	Max
2020 E&E Exhibit Solutions	\$40,000	\$60,000
ProExhibits HQ	\$30,000	\$40,000
Expo Outfitters	\$10,000	\$40,000
Mean	\$26,667	\$46,667
Median	\$30,000	\$40,000



Appendix 3.2: Trail Budget Breakdown

	Y1	Y2	Y3	Y4	Y5	Y6
Web	\$ 5,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
Advertising	\$ 38,000	\$ 38,000	\$ 38,000	\$ 30,000	\$ 30,000	\$ 30,000
Labor	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
Misc. Start-Up	\$ 54,000	\$ 27,000	\$ 54,000	\$ 27,000	\$ -	\$ -
Expenses	\$ 197,000	\$ 166,000	\$ 193,000	\$ 158,000	\$ 131,000	\$ 131,000
External Funding Requirement	\$ 191,000	\$ 145,000	\$ 155,500	\$ 102,000	\$ 57,000	\$ 39,000

Sources: Y1 projected budget, Virginia Oyster Trail Comparable



Appendix 3.3: Trail Revenues

	Y1	Y2	Y3	Y4	Y5	Y6
Regions (Hubs)	2	3	5	6	6	6
Sites	30	50	80	120	160	200
<i>New Site Fee</i>	\$ 50	\$ 50	\$ 50	\$ 50	\$ 50	\$ 50
<i>Site Fee</i>	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200
Sponsorships	\$ -	\$ 10,000	\$ 20,000	\$ 30,000	\$ 40,000	\$ 50,000
Fees	\$ 6,000	\$ 11,000	\$ 17,500	\$ 26,000	\$ 34,000	\$ 42,000
Trail Revenue	\$ 6,000	\$ 21,000	\$ 37,500	\$ 56,000	\$ 74,000	\$ 92,000

Sources: Y1 projected budget, Virginia Oyster Trail comparable, recommended trail expansion



Appendix 4.1: Oyster sales potential by region

Region where sold	Number of Restaurants ¹	Percent that serve or might serve oysters ²	Avg restaurant price ³	Tier 1 and Tier 2 Coastal Multiple ⁴	Percent share of economic benefit to Tier 1 and Tier 2 Coast ⁵	North Carolina Multiple ⁶	Percent share of economic benefit to North Carolina ⁷
Triangle	2630	9%	\$ 2.12	71.2	11%	594.6	18%
Triad	1498	8%	\$ 1.50	38.2	6%	244.5	7%
Charlotte	1914	21%	\$ 2.36	129.6	19%	1179.5	36%
Tier 3 Coastal	1018	16%	\$ 2.16	51.9	8%	439.8	13%
Tier 1&2 Coastal	1052	19%	\$ 1.46	288.3	43%	406.5	12%
All Other	8100	4%	\$ 1.00	91.4	14%	441.8	13%

Column	Source/Notes
1	Simply Analytics
2	Based on sample of 20-50 restaurant menus from each region, lower bound of 80% or 85% confidence interval, depending on sample size
3	Based on sample of 20-50 restaurant menus from each region, lower bound of 80% or 85% confidence interval, depending on sample size
4	Unitless value used to compare impact on Tier 1 and Tier 2 economies, driven only by farm gate value and induced/indirect spending unless sale region is Tier 1 or Tier 2 coast, based on 59% of oyster producers being located in Tier 1 or Tier 2 counties (data from NC Shellfish Growers Association)
5	Tier 1 and Tier 2 Coastal multiple converted to percentage of total
6	Unitless value used to compare impact on total North Carolina economy
7	North Carolina multiple converted to percentage of total



Appendix 4.2: Oyster economic impact value chain

Label	Value	Source
Average VA unit farm gate value for single- or spat-on-shell oysters (2016)	\$0.41	Virginia Shellfish Aquaculture Situation and Outlook, Virginia Institute of Marine Science, 2017
Bushels of VA spat-on-shell (2016)	46,000	Virginia Shellfish Aquaculture Situation and Outlook, Virginia Institute of Marine Science, 2017
Bushels of VA single-shell cultivated oysters	325,000	Calculated Value
Bushels of VA cultivated oysters	371,000	Virginia oyster harvest drops by 19,000 bushels in 2015-16, Daily Press, 12/23/2016
Average NC Price paid to distributor for non-half-shell oysters	\$0.47	Restaurant Survey
Average NC Price paid to distributor for half-shell oysters	\$0.61	Restaurant Survey
Ratio of half-shell to non-half-shell oyster distributor prices	1.30	Calculated Value
Weighted average ratio where 1 = 100% spat-on-shell	1.26	Calculated Value
Average NC price paid to producer for non-half-shell oysters	\$0.35	Calculated Value
Average NC price paid to producer for half-shell oysters	\$0.42	Calculated Value
NC cultivated oyster value (2016)	\$1,100,000	Comments from NC Sea Grant on projecting 10-year oyster farming industry metrics, NC Sea Grant, 9/7/2017
NC oyster wild harvest value (2017)	\$4,500,000	Calculated value
NC total oyster production value (2017)	\$5,600,000	NC Department of Marine Fisheries 2017 Annual Fisheries Bulletin
NC cultivated oyster units	2,619,048	Calculated value, assumes all cultivated oysters are sold on half shell
NC wild harvest oyster units	12,857,143	Calculated value, assumes no wild harvest oysters are sold on half shell
Total NC oysters produced	15,476,190	Calculated value
Weighted average producer price for NC oyster	\$0.36	Calculated value, attempts to account for price and production volume differences in half-shell vs. non-half-shell oysters

All calculated values are estimates based on assumptions and available data. Actual values may differ. Actual prices would likely increase over time.



Appendix 4.3: Virginia Oyster Industry Growth

Year	Farmgate (millions)	% growth
2005	0.8	
2006	3.1	288%
2007	4.8	55%
2008	9.8	104%
2009	12.6	29%
2010	16.9	34%
2011	23.3	38%
2012	28.1	21%
2013	33.7	20%
2014	40.5	20%

Source: VirginiaOysterTrail.com



Appendix 4.4: Sensitivity Analysis of cultivated oyster sales growth—50% of Virginia rate (low)

Year	Farm Gate Value	YoY Growth	Downstream Oyster Sales (Total)	% of Oysters Sold Out of State	NC Downstream Oyster Sales	Induced and Indirect Spending
Year 1	\$1,100,000	144%	\$2,933,333	10%	\$2,640,000	\$1,650,000
Year 2	\$2,681,250	27%	\$7,150,000	17%	\$5,918,611	\$4,021,875
Year 3	\$3,416,431	52%	\$9,110,484	24%	\$6,883,477	\$5,124,647
Year 4	\$5,195,823	14%	\$13,855,528	32%	\$9,467,944	\$7,793,734
Year 5	\$5,938,083	17%	\$15,834,889	39%	\$9,676,876	\$8,907,125
Year 6	\$6,951,328	19%	\$18,536,874	46%	\$9,989,315	\$10,426,991
Year 7	\$8,267,555	10%	\$22,046,814	53%	\$10,288,513	\$12,401,333
Year 8	\$9,119,149	10%	\$24,317,731	61%	\$9,591,994	\$13,678,723
Year 9	\$10,031,064	10%	\$26,749,504	68%	\$8,619,285	\$15,046,596
Year 10	\$11,034,170	10%	\$29,424,454	75%	\$7,356,114	\$16,551,255
10-year Totals	\$63,734,854		\$169,959,609		\$80,432,128	\$95,602,280



Appendix 4.4: Sensitivity Analysis of cultivated oyster sales growth—80% of Virginia rate (most likely)

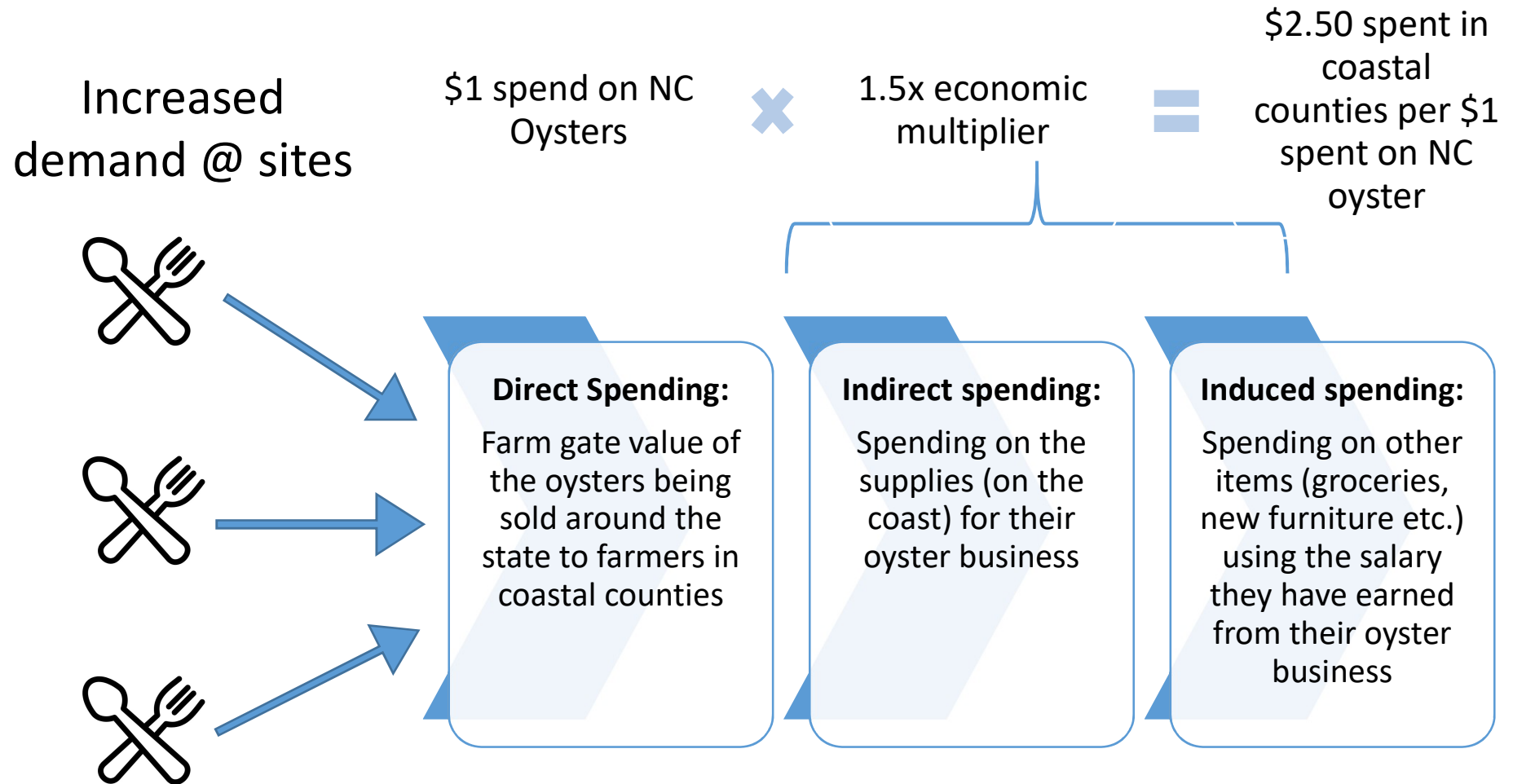
Year	Farm Gate Value	YoY Growth	Downstream Oyster Sales (Total)	% of Oysters Sold Out of State	NC Downstream Oyster Sales	Induced and Indirect Spending
Year 1	\$1,100,000	316%	\$2,933,333	10%	\$2,640,000	\$1,650,000
Year 2	\$4,578,750	60%	\$12,210,000	17%	\$10,107,167	\$6,868,125
Year 3	\$7,340,770	115%	\$19,575,387	24%	\$14,790,292	\$11,011,155
Year 4	\$15,752,069	31%	\$42,005,518	32%	\$28,703,771	\$23,628,104
Year 5	\$20,702,720	38%	\$55,207,252	39%	\$33,737,765	\$31,054,079
Year 6	\$28,474,455	42%	\$75,931,880	46%	\$40,918,846	\$42,711,682
Year 7	\$40,336,003	23%	\$107,562,674	53%	\$50,195,915	\$60,504,004
Year 8	\$49,476,522	22%	\$131,937,392	61%	\$52,041,971	\$74,214,783
Year 9	\$60,361,357	22%	\$160,963,618	68%	\$51,866,055	\$90,542,035
Year 10	\$73,640,855	22%	\$196,375,614	75%	\$49,093,904	\$110,461,283
10-year Totals	\$301,763,502		\$804,702,669		\$334,095,685	\$452,645,252



Appendix 4.4: Sensitivity Analysis of cultivated oyster sales growth—110% of Virginia rate (high)

Year	Farm Gate Value	YoY Growth	Downstream Oyster Sales (Total)	% of Oysters Sold Out of State	NC Downstream Oyster Sales	Induced and Indirect Spending
Year 1	\$1,100,000	316%	\$2,933,333	10%	\$2,640,000	\$1,650,000
Year 2	\$4,578,750	60%	\$12,210,000	17%	\$10,107,167	\$6,868,125
Year 3	\$7,340,770	115%	\$19,575,387	24%	\$14,790,292	\$11,011,155
Year 4	\$15,752,069	31%	\$42,005,518	32%	\$28,703,771	\$23,628,104
Year 5	\$20,702,720	38%	\$55,207,252	39%	\$33,737,765	\$31,054,079
Year 6	\$28,474,455	42%	\$75,931,880	46%	\$40,918,846	\$42,711,682
Year 7	\$40,336,003	23%	\$107,562,674	53%	\$50,195,915	\$60,504,004
Year 8	\$49,476,522	22%	\$131,937,392	61%	\$52,041,971	\$74,214,783
Year 9	\$60,361,357	22%	\$160,963,618	68%	\$51,866,055	\$90,542,035
Year 10	\$73,640,855	22%	\$196,375,614	75%	\$49,093,904	\$110,461,283
10-year Totals	\$49,474,309		\$131,931,491		\$89,978,995	\$74,211,464

Appendix 4.5: IMPLAN Model





Appendix 4.6: Measures of incremental success

The best indicator of Oyster Trail performance would be the *incremental* boost the Oyster Trail provides to oyster sales and other spending. “Incremental” in this situation is the *additional* spending that takes place *solely because of* the Oyster Trail and independently of all other factors.

However, this is an exceedingly difficult concept to measure accurately. It would be very difficult and expensive to collect the necessary data, and the activities necessary to collect the data would likely turn visitors away from the Trail and would still be an imperfect estimate. Experts we have interviewed do not believe this is a realistic goal.

More realistic metrics of success that could be implemented more easily would be things like:

- Number of Trail-wide physical visitors
 - Average sites visited per visitor
 - Website visits
 - Social media engagement
 - Participation in gamification activities like the passport
 - Attendance at Trail-hosted events
-



Appendix 5.1: Suggested North Carolina Oyster Trail Requirements

General for all trail sites:

- The site features and promotes the North Carolina Oyster.
- The site guarantees North Carolina Oyster authenticity and quality.
- The site celebrates the cultural diversity of the region and reflects positively on its heritage.
- The site is well marked with a business sign
- The site displays a NC Oyster Trail sign.
- The site specifies and maintains regular business hours. The site is visitor friendly, clean, safe and provides adequate restrooms, ample parking, directional signs, icon denoting handicap accessibility, etc.
- The site's parking area is easily accessible by 2-wheel drive vehicles.
- The site promotes, connects and collaborates with other participants on the North Carolina Oyster Trail.
- The site is featured or agrees to be featured on the North Carolina Tourism Corporation website.



Appendix 5.1: Suggested North Carolina Oyster Trail Requirements

Restaurants:

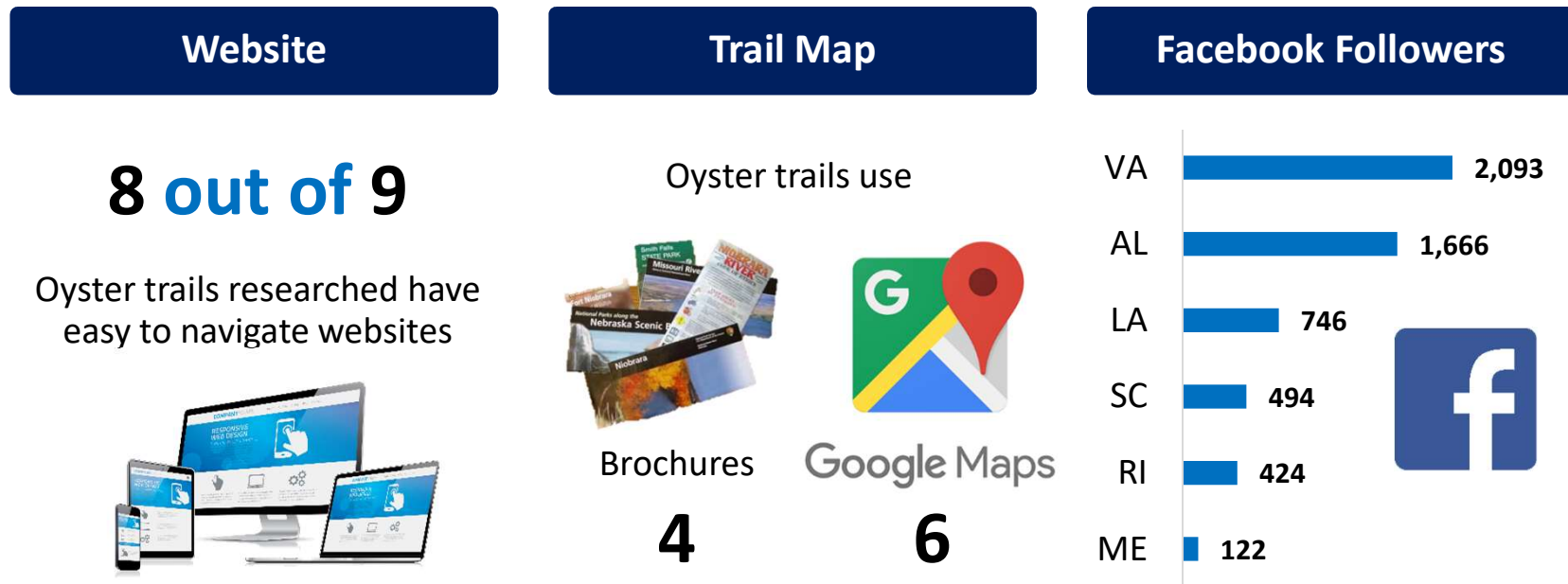
- Feature and promote at least one North Carolina Oyster producer's product while offering different menu preparations (half-shell, roasted, fried, baked, stewed, seasoned, etc.).
- Creates a separate North Carolina Oyster story sheet (akin to a wine list).
- Describes the type of North Carolina Oyster being served, i.e., the region it came from and distinguishing taste characteristics.
- Notes the name of the North Carolina producers or watermen who supplied the oysters.
- Option, yet highly encouraged: Recommend pairings where North Carolina-made beverages, condiments, produce, meats, dairy products are served.
- Wineries and Breweries must either:
 - Participate or host at least 3 NC oyster Events/Year
 - Serves NC Oysters as a menu option at least 2 days a week

Cultural & Historical

- The site specifically features the North Carolina Oyster's cultural heritage within the region.
- The site features educational activities that are open to the public and provide content specific to the North Carolina Oyster whether artistic, environmental, historical, or business related.
- A point of interest site features recreational and/or event activities that specifically revolve around the North Carolina Oyster.



Appendix 6.1: Comparable oyster trails* online presence



*Trails analyzed include Virginia Oyster Trail, The Oyster Trail of Maine, Central Maryland Crab & Oyster Trail, Lowcountry Oyster Trail, The Oyster Trail (Mobile, AL), Panama City Oyster Trail, Louisiana Oyster Trail, Puget Sound Oyster Trail and Rhode Island Oyster Trail



Appendix 6.2: Virginia Trail Management Team

35 people

28 organizations

Artisans Center of Virginia	Chesapeake Bay Foundation
Shellfish Growers of Virginia	VA Dept. of Housing & Community Development
VA Dept. of Agriculture	VA Tourism Corporation
VA Marine Products Board	VA Foundation for the Humanities
Small Business Administration	Small businesses
Individual watermen	Colleges & schools



Appendix 6.3: Virginia Trail General Site Criteria

PARTICIPATION DETAILS

General Agri-Artisans Restaurants Lodging Points of Interest Artists Art Retail Venues

GENERAL CRITERIA – ALL VIRGINIA OYSTER TRAIL SITES

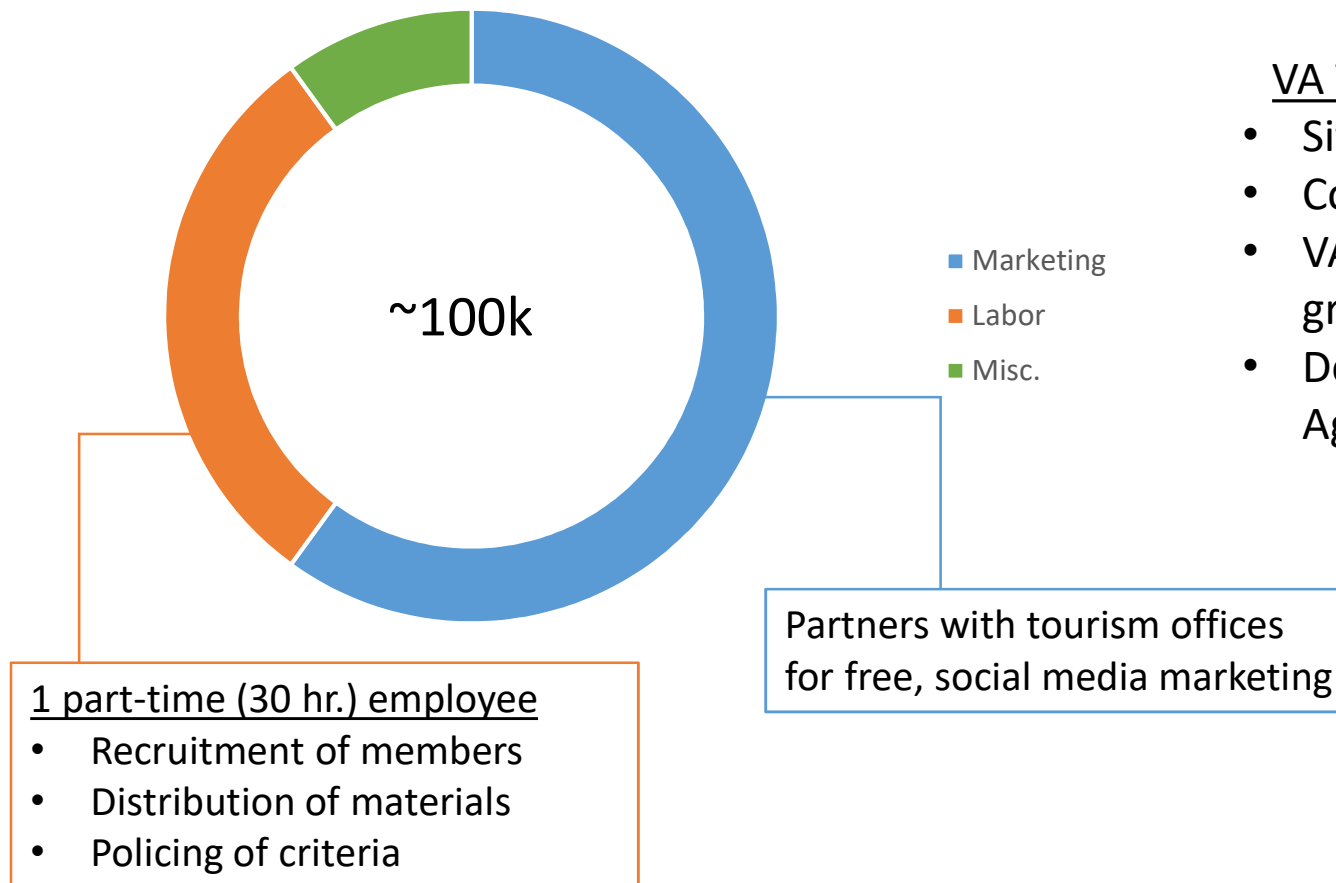
- The site features and promotes a genuine Virginia Oyster visitor experience.
- The site focuses and guarantees Virginia Oyster authenticity and quality.
- The site celebrates the cultural diversity of the region and reflects positively on its heritage.
- The site is well marked with a business sign (a VOT trail sign will be provided once qualified).
- The site specifies and maintains regular business hours. Seasonal hours are acceptable. Businesses that are open to the public “by appointment only” or fewer than two days per week will be considered.
- The site is visitor friendly, clean, safe and provides adequate restrooms, ample parking, directional signs, icon denoting handicap accessibility, etc.
- The site’s parking area is easily accessible by 2-wheel drive vehicles (4-wheel drive only access areas do not qualify).
- The site promotes, connects and collaborates with other participants on the Virginia Oyster Trail.
- The site is featured or agrees to be featured on the Virginia Tourism Corporation website: Virginia.org (Note: other Virginia Oyster Industry related website participation is recommended however not required for trail participation).

Program Disclaimer: All trail site businesses/owners are solely responsible for complying with zoning regulations, ordinances, health and business licensing requirements as well as any required or discretionary insurance liability coverage in addition to taking steps to reduce/eliminate risk due to negligence.

The enrollment application is subject to review to ensure the business meets participation criteria. Once you are approved, you will receive an official 'welcome' with the login codes and a trail sign will be made available.

Appendix 6.4: Virginia Trail Budget & Revenues

VA Trail Budget Breakdown



VA Trail Revenue Streams

- Site membership fees
- Corporate sponsorships
- VA Tourism Corporation grant (35k)
- Department of Agriculture grant (35k)

Source: Steve Gaylean, VA Oyster Trail

5/17/2018

92



Appendix 7.1: Oyster festivals

- North Carolina Oyster Festival
 - Ocean Isle, NC
 - 38th year
- Crystal Coast Oyster Festival
 - Morehead City, NC
 - 3rd Year
- Outer Banks Seafood Festival
 - Nags Head, NC
- Wrightsville Beach Oyster Festival
 - Wilmington, NC
- Smoky Mountain Oyster and Seafood Festival
 - Asheville, NC

North Carolina already has several oyster festivals, several of which are listed to the left.

Our team believes it would be ill-advised to create an additional, competing oyster festival which could rob these communities of the benefits they should be able to reap for their work in creating these events.

We do believe, however, that existing festivals should be leveraged and included in the Oyster Trail along with other events throughout the year.



Appendix 8.1: Consumer survey

- 320 total respondents
- 200 paid respondents
- Administered through Qualtrics
- ~60% from NC, other ~40% from the 10 states with highest number of visitors to NC
- Selected insights and complete questions on following slides



Appendix 8.1: Consumer survey insights

Consumer oyster trail interest by NC regions of interest		
Interested or very interested in visting:	Percent also interested in oyster trail	
RDU		42%
Charlotte		44%
Greensboro/Winston-Salem		45%
Outer Banks		38%
Central Coast		43%
Southern Coast		40%
Western NC		30%

Consumer willingness to pay (WTP) per half-shell restaurant oyster by NC regions of interest		
Interested or very interested in visting:	Average WTP per oyster	
Greensboro/Winston-Salem	\$	2.09
Charlotte	\$	2.01
RDU	\$	2.00
Central Coast	\$	1.05
Southern Coast	\$	0.99
Western NC	\$	0.88
Outer Banks	\$	0.86

Effects of educational messages on consumer WTP		
Message	Average WTP per half-shell restaurant oyster	If agree or strongly agree with message
Told about environmental benefits of oysters	\$ 1.66	\$ 1.84
Told about oyster benefits to rural communities	\$ 1.69	\$ 1.65
Told nothing	\$ 1.72	

Interest in Oyster Trail by age	
Age	Percent interested or very interested
18 - 24	36%
25 - 34	35%
35 - 44	42%
45 - 54	18%
55 - 64	19%
65 or older	29%

Oyster dining habits by age	
Age	Percent who have eaten an oyster in a restaurant in last 12 months
18 - 24	67%
25 - 34	63%
35 - 44	71%
45 - 54	61%
55 - 64	48%
65 or older	46%

Oyster dining habits by age	
Age	Percent who have eaten an oyster in a restaurant 3 or more times in last 12 months
18 - 24	22%
25 - 34	26%
35 - 44	43%
45 - 54	22%
55 - 64	14%
65 or older	8%



Appendix 8.1: Consumer survey insights

Consumer Perceptions of Eating Oysters in Summer	
Safe and good during summer	17.83%
Safe, but not as good during summer	22.48%
Not safe during summer	9.30%
Not sure	50.39%

Consumer familiarity with trail concept?	
Yes	41%
No	59%

Top reasons why people not interested in trying oysters are not interested	
They look gross	68.4%
Believe they are unsafe to eat	22.8%
Too expensive	12.3%
Dietary restriction	7.0%
Other	3.5%

Please rate how thinking about merroir might affect your future interest in tasting a variety of oysters	
Much more interested	12.40%
A little more interested	32.56%
It does not affect my level of interest	48.06%
Less interested	3.88%
Much less interested	3.10%

Consumer perceptions of oyster qualities by state of origin						
	Maine	Washington	Virginia	Maryland	North Carolina	Louisiana
Good Flavor	47%	33%	38%	44%	43%	43%
Large	32%	23%	22%	22%	31%	26%
Small	17%	18%	20%	17%	16%	14%
High cost	21%	30%	21%	20%	15%	16%
Low cost	14%	11%	19%	14%	27%	24%
Available year-round	30%	22%	18%	22%	31%	34%
Easy to obtain	29%	21%	34%	31%	38%	33%



Appendix 8.1: Consumer survey

Start of Block: Block 22

Q38 This survey is being conducted in support of research by students at the University of North Carolina's Kenan-Flagler Business School. The survey will help us to characterize potential customers' and visitors' preferences for and awareness of North Carolina attractions and select North Carolina products.

We have avoided collecting personally identifiable information or personal information except when necessary to validate sampling or crucial to our research questions. Analyses of this research will be made publicly available, but all responses will be represented in aggregate and no participant's specific responses will be published.

No one is required to participate in this survey, so by proceeding to the next screen, you are agreeing to participate.

End of Block: Block 22

Start of Block: Block 23

Q37 What is your age?

- ☐ 18 - 24 (1)
- ☐ 25 - 34 (2)
- ☐ 35 - 44 (3)
- ☐ 45 - 54 (4)
- ☐ 55 - 64 (5)
- ☐ 65 or older (6)

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Q37 What is your gender?

- ☐ Male (1)
- ☐ Female (2)
- ☐ Other (3)
- ☐ I prefer not to respond (4)

End of Block: Block 23

Start of Block: Default Question Block

Q1 In what city do you live?

Q2 In what county/parish do you live?

Q4 In which state do you currently reside?

▼ Select from list (54) ... I do not reside in the United States (53)

End of Block: Default Question Block

Start of Block: State

Display This Question

50 States, D.C. and Puerto Rico != North Carolina

Page 5 of 24

Q5 If you have visited North Carolina in the last 12 months, what were your reasons for visiting? Check all that apply. If you did not visit, proceed to the next question without checking any options.

- ☐ Business (1)
- ☐ Visiting family/friends (2)
- ☐ Shopping (3)
- ☐ Urban sightseeing (4)
- ☐ Rural sightseeing (5)
- ☐ Outdoor recreation (6)
- ☐ Other (7) _____

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Appendix 8.1: Consumer survey

Q6 Please rate your interest in the following kinds of North Carolina attractions.

	Not interested (1)	Somewhat interested (2)	Interested (3)	Very interested (4)
Historic sites (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Casual restaurants (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Upscale restaurant (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Breweries (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wineries (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aquariums (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Museums (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Eco-Tours (8)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page 7 of 24

Q7 Please rate your interest in the following North Carolina regions.

	Not interested (1)	Somewhat interested (2)	Interested (3)	Very interested (4)
Charlotte metro area (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Raleigh/Durham metro area (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Greensboro/Winston- Salem metro area (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Northern coast (including Outer Banks) (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Central Coast (including Morehead City) (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Southern Coast (including Wilmington) (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Western North Carolina (including Asheville and Blue Ridge Mountains) (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: State

Start of Block: Block 2

Page 8 of 24

Q8 How frequently do you rely on the following sources of information to make restaurant decisions?

	Never (1)	Rarely (2)	Sometimes (3)	Often (4)	Almost Always (5)
Web search (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social media (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yelp/TripAdvisor or similar review site (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Print advertisements (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family/friends (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Looking at storefronts (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Appendix 8.1: Consumer survey

<p>Q8 How frequently do you rely on the following sources of information when planning a trip?</p> <table><tr><th></th><th>Never (1)</th><th>Rarely (2)</th><th>Sometimes (3)</th><th>Often (4)</th><th>Almost Always (5)</th></tr><tr><td>Your own experience (1)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Friends/family (2)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Search engines (Bing, Google, etc.) (3)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Social media (Facebook, Twitter, LinkedIn, etc.) (4)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Online full service travel site (Expedia, Orbitz, Priceline, etc.) (5)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Travel provider website (airline, hotel, tour, etc.) (6)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Destination website (official visitor's site for state/city/attraction) (7)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Travel review sites (Yelp, TripAdvisor, etc.) (8)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Destination printed materials (brochures, pamphlets, etc.) (9)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Travel club/agency (AAA, etc.) (10)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr></table> <p>End of Block: Block 2</p> <p>Start of Block: Block 3</p>		Never (1)	Rarely (2)	Sometimes (3)	Often (4)	Almost Always (5)	Your own experience (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Friends/family (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Search engines (Bing, Google, etc.) (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Social media (Facebook, Twitter, 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type="radio"/>	Travel club/agency (AAA, etc.) (10)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<p>Q10 Before taking this survey, were you familiar with the concept of a visitor "trail" that includes multiple "stops" designed to promote a local food, beverage, or cultural element?</p> <p><input type="radio"/> Yes (1)</p> <p><input type="radio"/> No (2)</p> <p>Q11 Please rate your interest in visiting the following kinds of visitor trails.</p> <table><tr><th></th><th>Not interested (1)</th><th>Somewhat interested (2)</th><th>Interested (3)</th><th>Very interested (4)</th></tr><tr><td>Beer trail (1)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Wine trail (2)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>BBQ trail (3)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Oyster trail (4)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Music trail (5)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>History trail (6)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Other (7)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr></table> <p>End of Block: Block 3</p> <p>Start of Block: Block 4</p>		Not interested (1)	Somewhat interested (2)	Interested (3)	Very interested (4)	Beer trail (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Wine trail (2)	<input 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Please rate how frequently you choose foods based on the following statements.</p> <table><tr><th></th><th>Never (1)</th><th>Rarely (2)</th><th>Sometimes (3)</th><th>Often (4)</th><th>Almost always (5)</th></tr><tr><td>I choose foods that are grown or produced locally (1)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>I choose foods that are nutritious (2)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>I choose foods that are affordable (3)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>I choose foods I am familiar with (4)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>I choose foods that are tasty (5)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr></table> <p>End of Block: Block 4</p> <p>Start of Block: Block 5</p> <p>Q13 Have you ever eaten an oyster?</p> <p><input type="radio"/> Yes (1)</p> <p><input type="radio"/> No (2)</p> <p>End of Block: Block 5</p> <p>Start of Block: Block 6</p> <p>Display This Question:</p> <p>If Have you ever eaten an oyster? = Yes</p> <table><tr><td>Q14</td><td>half shell</td><td>Fried</td><td>Raw on half shell</td><td>Cooked on</td></tr></table>		Never (1)	Rarely (2)	Sometimes (3)	Often (4)	Almost always (5)	I choose foods that are grown or produced locally (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	I choose foods that are nutritious (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	I choose foods that are affordable (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	I choose foods I am familiar with (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	I choose foods that are tasty (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Q14	half shell	Fried	Raw on half shell	Cooked on
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Q14	half shell	Fried	Raw on half shell	Cooked on																																																																																																																																																	

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Appendix 8.1: Consumer survey

+ Please rate your level of agreement with the following statements:

	Have not tried (1)	Strongly disagree (2)	Disagree (3)	Neither agree nor disagree (4)	Agree (5)	Strongly agree (6)
I like oysters served raw and on the half shell (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like oysters served cooked and on the half shell (steamed, baked, etc.) (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like oysters served cooked and not on the half shell (fried, stewed, etc.) (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: Block 6

Start of Block: Block 7

Display This Question:

If Have you ever eaten an oyster? = Yes

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Q15 How many times in the last 12 months have you eaten oysters in a restaurant?

- ☐ Zero (1)
- ☐ 1 or 2 times (2)
- ☐ 2 to 5 times (3)
- ☐ 6 to 12 times (4)
- ☐ More than 12 times (5)

End of Block: Block 7

Start of Block: Block 8

Display This Question:

If Have you ever eaten an oyster? = No

Q16 Would you consider trying an oyster?

- ☐ Yes (1)
- ☐ Maybe (2)
- ☐ No (3)

End of Block: Block 8

Start of Block: Block 9

Display This Question:

If Would you consider trying an oyster? = No

Page 14 of 24

Q17 For each of the following states, please check all of the qualities you believe apply to that state's oysters.

	Small in size (1)	Large in size (2)	Good flavors (3)	Easy to obtain (4)	Available year-round (5)	Low cost (6)	High cost (7)
Maine (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maryland (3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Virginia (4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
North Carolina (5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Louisiana (6)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

End of Block: Block 9

Start of Block: Block 26

Display This Question:

If Would you consider trying an oyster? = No

Q38 In what month range is your birthday?

- ☐ January - April (1)
- ☐ May - August (2)
- ☐ September - December (3)

End of Block: Block 26

Start of Block: Block 10

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Appendix 8.1: Consumer survey

<p>Display This Question: If in what month range is your birthday? = January - April And Would you consider trying an oyster? = No</p> <p>Q18 Many rural fishing communities have experienced an economic downturn over recent decades as the commercial fishing industry has declined. Oyster production may be a more sustainable source of jobs for these communities. By purchasing oysters, you support these communities by providing sustainable jobs for oyster producers and the other businesses that support them.</p> <p>Based only on the statement above and your knowledge prior to taking this survey, how would you rate your level of agreement with the statement?</p> <p><input type="radio"/> Strongly agree (1) <input type="radio"/> Agree (2) <input type="radio"/> Neither agree nor disagree (3) <input type="radio"/> Disagree (4) <input type="radio"/> Strongly disagree (5)</p> <p>End of Block: Block 10</p> <p>Start of Block: Block 11</p> <p>Display This Question: If in what month range is your birthday? = May - August And Would you consider trying an oyster? = No</p>	<p>Q19 Oysters play a valuable role in coastal ecosystems. One benefit that oysters provide is water filtration. A single oyster can clean up to 50 gallons of water a day. By purchasing oysters, you provide incentives for oyster producers to increase the number of oysters in the water. This will lead to cleaner water and healthier ecosystems.</p> <p>Based only on the statement above and your knowledge prior to taking this survey, how would you rate your level of agreement with the statement?</p> <p><input type="radio"/> Strongly agree (1) <input type="radio"/> Agree (2) <input type="radio"/> Neither agree nor disagree (3) <input type="radio"/> Disagree (4) <input type="radio"/> Strongly disagree (5)</p> <p>End of Block: Block 11</p> <p>Start of Block: Block 17</p> <p>Display This Question: If Would you consider trying an oyster? = No</p> <p>Q20 In a restaurant, would you be willing to pay \$2.50 for a single oyster (no discount for buying multiple) served on the half shell (either raw or cooked)?</p> <p><input type="radio"/> Yes (1) <input type="radio"/> No (2)</p> <p>Display This Question: If in a restaurant, would you be willing to pay \$2.50 for a single oyster (no discount for buying multiple) = No</p>	<p>Q21 In a restaurant, would you be willing to pay \$1.50 for a single oyster (no discount for buying multiple) served on the half shell (either raw or cooked)?</p> <p><input type="radio"/> Yes (1) <input type="radio"/> No (2)</p> <p>Display This Question: If in a restaurant, would you be willing to pay \$2.50 for a single oyster (no discount for buying multiple) = Yes</p> <p>Q22 In a restaurant, would you be willing to pay \$3.50 for a single oyster (no discount for buying multiple) served on the half shell (either raw or cooked)?</p> <p><input type="radio"/> Yes (1) <input type="radio"/> No (2)</p> <p>Display This Question: If in a restaurant, would you be willing to pay \$1.50 for a single oyster (no discount for buying multiple) = Yes</p> <p>Q23 In a restaurant, would you be willing to pay \$2.00 for a single oyster (no discount for buying multiple) served on the half shell (either raw or cooked)?</p> <p><input type="radio"/> Yes (1) <input type="radio"/> No (2)</p> <p>Skip To: End of Block If in a restaurant, would you be willing to pay \$2.00 for a single oyster (no discount for buying multiple) = Yes</p> <p>Display This Question: If in a restaurant, would you be willing to pay \$1.50 for a single oyster (no discount for buying multiple) = No</p>
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Appendix 8.1: Consumer survey

Q24 In a restaurant, would you be willing to pay \$1.00 for a single oyster (no discount for buying multiple) served on the half shell (either raw or cooked)?

- ☐ Yes (1)
☐ No (2)

Skip To: End of Block If in a restaurant, would you be willing to pay \$1.00 for a single oyster (no discount for buying multiple) = Yes

Skip To: End of Block If in a restaurant, would you be willing to pay \$1.00 for a single oyster (no discount for buying multiple) = No

Display This Question:

If in a restaurant, would you be willing to pay \$3.50 for a single oyster (no discount for buying multiple) = Yes

Q25 In a restaurant, would you be willing to pay \$3.00 for a single oyster (no discount for buying multiple) served on the half shell (either raw or cooked)?

- ☐ Yes (1)
☐ No (2)

Skip To: End of Block If in a restaurant, would you be willing to pay \$3.00 for a single oyster (no discount for buying multiple) = Yes

Skip To: End of Block If in a restaurant, would you be willing to pay \$3.00 for a single oyster (no discount for buying multiple) = No

Display This Question:

If in a restaurant, would you be willing to pay \$3.50 for a single oyster (no discount for buying multiple) = Yes

Q26 In a restaurant, would you be willing to pay \$4.00 for a single oyster (no discount for buying multiple) served on the half shell (either raw or cooked)?

- ☐ Yes (1)
☐ No (2)

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End of Block: Block 17

Start of Block: Block 18

Display This Question:

If Would you consider trying an oyster? != No

Q27 Which of the following statements do you agree with most?

- ☐ Oysters are unsafe to eat during the summer (1)
☐ Oysters are safe to eat during the summer, but do not taste as good as during other seasons (2)
☐ Oysters are safe to eat during the summer and taste as good as during other seasons (3)
☐ Not sure (4)

End of Block: Block 19

Start of Block: Block 20

Display This Question:

If Would you consider trying an oyster? != No

Q28 Do you ever consider whether an oyster is farm-raised or wild when choosing an oyster?

- ☐ Yes, I prefer farm-raised oysters (1)
☐ Yes, I prefer wild harvest oysters (2)
☐ No (3)

End of Block: Block 20

Start of Block: Block 21

Display This Question:

If Would you consider trying an oyster? != No

Q29 Myth-busting:

An old piece of advice, which many people have heard, is that one should not eat oysters during the summer. However, this is not true.

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Most wild oysters reproduce during the summer which can cause them to have a more "squidgy" texture than at other times of the year. Farm-raised oysters are indistinguishable in taste and texture from wild oysters (outside of the summer months). Farm-raised oysters are also sterile and do not reproduce. This means their taste and texture is consistent throughout the year—including during the summer.

Warmer months do pose more of a threat to water quality and food safety, but oysters that are sold in restaurants and stores are monitored in the water and carefully handled to ensure they remain safe to eat throughout the year.

End of Block: Block 21

Start of Block: Block 22

Display This Question:

If Would you consider trying an oyster? != No

Q30 "Merroir" is the concept that an oyster's size, texture, color, flavor, and other qualities are determined by that oyster's unique growing conditions, such as water temperature, water salinity, presence of sea grasses in the water, etc. Each batch of oysters from a producer will be a little different and oysters from different areas tend to have different merroirs.

Merroir is analogous in many ways to "terroir", which is typically discussed in the context of tasting wine.

Please rate your familiarity with the concept of merroir before taking this survey.

- ☐ Extremely familiar (1)
☐ Very familiar (2)
☐ Somewhat familiar (3)
☐ Not so familiar (4)
☐ Not at all familiar (5)
☐ Disagree (6)

End of Block: Block 22

Start of Block: Block 23

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Appendix 8.1: Consumer survey

Display This Question:

If Would you consider trying an oyster? != No

Q31 Please rate how thinking about merroir might affect your future interest in tasting a variety of oysters.

- ☐ Much more interested (1)
- ☐ A little more interested (2)
- ☐ It does not affect my level of interest (3)
- ☐ Less interested (4)
- ☐ Much less interested (5)

End of Block: Block 23

Start of Block: Block 24

Display This Question:

If Would you consider trying an oyster? = No

Q32 What factors prevent you from trying oysters?

- ☐ Dietary restrictions (1)
- ☐ They look gross (2)
- ☐ They are too expensive (3)
- ☐ I believe they are unsafe to eat (4)
- ☐ Other (5) _____

End of Block: Block 24

Start of Block: Block 25

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Q36 How many people related to you live in your household? Please include yourself.

- ☐ 1 (1)
- ☐ 2 (2)
- ☐ 3 or more (3)

Q35 What is your estimated household income?

- ☐ Less than \$15,000 (1)
- ☐ Between \$15,000 and \$29,999 (2)
- ☐ Between \$30,000 and \$49,999 (3)
- ☐ Between \$50,000 and \$74,999 (4)
- ☐ Between \$75,000 and \$99,999 (5)
- ☐ Between \$100,000 and \$149,999 (6)
- ☐ Between \$150,000 and \$199,999 (7)
- ☐ \$200,000 or more (8)

End of Block: Block 25

Start of Block: Block 21

Q39 Is there anything else you would like to tell us?

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Appendix 8.2: Restaurant survey

- 16 respondents
- Administered through Qualtrics
- All respondents from North Carolina
- Questions on following slides



Appendix 8.2: Restaurant survey insights

- 43% of respondents care whether oysters are wild or cultivated
 - 67% of those who care say they prefer wild
- “Environmental benefits” and “Voiced demand by customers” were the most convincing arguments for adding oysters to (or keeping oysters on) menus
- “Contributing to environmental benefits” and “Contributing to eating local” were the most convincing arguments for participating in the NC Oyster Trail
- 29% of restaurants said NC oysters were easy to obtain

Restaurant perceptions of eating oysters in summer	
Safe and good during summer	29%
Safe, but not as good during summer	43%
Not safe during summer	14%
Not sure	14%



Appendix 8.2: Restaurant survey insights

- 71% of restaurants surveyed were interested or very interested in participating in the oyster trail
 - All of the interested or very interested restaurants were willing to make all suggested contributions* to participate
 - All of the interested or very interested restaurants were willing to pay an annual fee to participate
 - Average maximum fee these restaurants were willing to pay was \$600
- There was a great deal of interest in Oyster Trail participation, particularly among Outer Banks seafood restaurants



Appendix 8.2: Restaurant survey

UNC Kenan-Flagler Oyster Trail Restaurant Survey

Start of Block: Block 32

Q51 This survey is being conducted by students at UNC Chapel Hill's Kenan-Flagler Business School. The student team conducting the research is working with several stakeholder groups to evaluate the feasibility of creating a North Carolina Oyster Trail and to provide recommendations to the State of North Carolina.

Your individual responses to this survey will be kept confidential among the researchers and all published results will only feature aggregations (e.g. averages, percentages) of data from large numbers of respondents.

Your participation is optional, but your thorough completion of as many questions as possible is very helpful and appreciated. Please click to proceed to the survey.

Thanks!

End of Block: Block 32

Start of Block: Default Question Block

Q33 What is the name of your restaurant/business?

End of Block: Default Question Block

Start of Block: Block 16

Q39 In which state is your restaurant/business located?

▼ Alabama (1) ... I do not reside in the United States (53)

Page 1 of 22

Q34 In what city is your restaurant/business located?

Q35 In what county/parish is your restaurant/business located?

End of Block: Block 16

Start of Block: Block 15

Q2 Which of these categories describe your business? Check all that apply.
(If none apply, proceed to next question without checking any option).

☐ Oyster bar (1)

☐ Seafood (2)

☐ Fine dining (3)

☐ Casual dining (4)

☐ Brewery/brew pub (5)

☐ Winery/wine bar (6)

End of Block: Block 15

Start of Block: Block 1

Q3 Who are your customers? Check all that apply.

☐ Locals (1)

☐ Out-of-town visitors (2)

☐ Families with children (3)

☐ Single individuals (4)

☐ Couples (5)

☐ Groups (6)

End of Block: Block 1

Start of Block: Block 2

Q4 In the last 90 days, have you featured oysters on your menu?

☐ Yes (1)

☐ No (2)

☐ Not sure (3)

Display This Question:
If in the last 90 days, have you featured oysters on your menu? = Yes

Q9 In the last 90 days, have you featured North Carolina oysters on your menu?

☐ Yes (1)

☐ No (2)

☐ Not sure (3)

End of Block: Block 2

Start of Block: Block 24

Page 2 of 22

Q3 Who are your customers? Check all that apply.

☐ Locals (1)

☐ Out-of-town visitors (2)

☐ Families with children (3)

☐ Single individuals (4)

☐ Couples (5)

☐ Groups (6)

End of Block: Block 1

Start of Block: Block 2

Q4 In the last 90 days, have you featured oysters on your menu?

☐ Yes (1)

☐ No (2)

☐ Not sure (3)

Display This Question:
If in the last 90 days, have you featured oysters on your menu? = Yes

Q9 In the last 90 days, have you featured North Carolina oysters on your menu?

☐ Yes (1)

☐ No (2)

☐ Not sure (3)

End of Block: Block 2

Start of Block: Block 24

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Appendix 8.2: Restaurant survey

<p>Display This Question: <i>If in the last 90 days, have you featured oysters on your menu? = Yes</i></p> <p>Q44 Would you consider adding oysters to your menu at any point in the future?</p> <p><input type="radio"/> Yes (1)</p> <p><input type="radio"/> Maybe (2)</p> <p><input type="radio"/> No (4)</p> <p>End of Block: Block 24</p> <p>Start of Block: Block 3</p> <p>Display This Question: <i>If in the last 90 days, have you featured oysters on your menu? = Yes</i></p> <p>Q45 How do (did) you serve oysters? Check all that apply.</p> <p><input type="checkbox"/> As part of a dish (e.g. po' boy, oyster stew) (1)</p> <p><input type="checkbox"/> Raw on the half shell (2)</p> <p><input type="checkbox"/> Cooked on the half shell (3)</p> <p><input type="checkbox"/> Other cooked, not part of another dish (e.g. fried) (4)</p> <p>End of Block: Block 3</p> <p>Start of Block: Block 24</p> <p>Display This Question: <i>If in the last 90 days, have you featured oysters on your menu? = Yes</i></p>	<p>Q21 Which of the following pieces of information do you include on your oyster menu? Check all that apply. If none, proceed to next question without checking any options.</p> <p><input type="checkbox"/> Which state each oyster is from (e.g. North Carolina, Washington) (1)</p> <p><input type="checkbox"/> The name of the producer (e.g. Taylor Shellfish Farms, Carolina Mariculture) (2)</p> <p><input type="checkbox"/> The geographic area the oyster is from (e.g. Bodie Island, Pamlico Sound, Willapa Bay) (3)</p> <p><input type="checkbox"/> Whether the oyster is farm-raised or wild harvest (4)</p> <p><input type="checkbox"/> Tasting notes (e.g. "briny", "melon flavors") (5)</p> <p><input type="checkbox"/> Notes about size/texture/shape (e.g. "large", "chewy", "deep cup") (6)</p> <p><input type="checkbox"/> Detail about the individual people producing the oysters (e.g. "John Smith", "family-run", "3rd generation") (7)</p> <p><input type="checkbox"/> The producer's logo (8)</p> <p>End of Block: Block 24</p> <p>Start of Block: Block 31</p> <p>Display This Question: <i>If How do (did) you serve oysters? Check all that apply. = As part of a dish (e.g. po' boy, oyster stew) Or How do (did) you serve oysters? Check all that apply. = Other cooked, not part of another dish (e.g. fried)</i></p>	<p>Q40 What price (on average) do you estimate that you pay your suppliers, per oyster, for oysters that you do not serve on the half shell?</p> <p><input type="radio"/> Up to \$0.10 (1)</p> <p><input type="radio"/> \$0.11 to \$0.20 (2)</p> <p><input type="radio"/> \$0.21 to \$0.30 (3)</p> <p><input type="radio"/> \$0.31 to \$0.40 (4)</p> <p><input type="radio"/> \$0.41 to \$0.50 (5)</p> <p><input type="radio"/> \$0.51 to \$0.60 (6)</p> <p><input type="radio"/> \$0.61 to \$0.70 (7)</p> <p><input type="radio"/> \$0.71 to \$0.80 (8)</p> <p><input type="radio"/> \$0.81 to \$0.90 (9)</p> <p><input type="radio"/> \$0.91 or more (10)</p> <p>End of Block: Block 31</p> <p>Start of Block: Block 17</p> <p>Display This Question: <i>If How do (did) you serve oysters? Check all that apply. = Raw on the half shell Or How do (did) you serve oysters? Check all that apply. = Cooked on the half shell</i></p>
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Appendix 8.2: Restaurant survey

<p>Q7 What price (on average) do you estimate that you pay your suppliers, per oyster, for oysters that you serve on the half shell? (Either raw or cooked)</p> <p><input type="radio"/> Up to \$0.20 (1)</p> <p><input type="radio"/> \$0.21 to \$0.40 (2)</p> <p><input type="radio"/> \$0.41 to \$0.60 (3)</p> <p><input type="radio"/> \$0.61 to \$0.80 (4)</p> <p><input type="radio"/> \$0.81 to \$1.00 (5)</p> <p><input type="radio"/> \$1.01 to \$1.20 (6)</p> <p><input type="radio"/> \$1.20 to \$1.40 (7)</p> <p><input type="radio"/> \$1.41 or more (8)</p> <p>End of Block: Block 17</p> <p>Start of Block: Block 4</p> <p>Display This Question:</p> <p>If How do (did) you serve oysters? Check all that apply. = Raw on the half shell</p> <p>Or How do (did) you serve oysters? Check all that apply. = Cooked on the half shell</p> <p>Page 7 of 22</p>	<p>Q10 What price (on average) do you estimate that you charge your customers, per oyster, for oysters that you serve on the half shell? (Either raw or cooked)</p> <p><input type="radio"/> Up to \$0.50 (1)</p> <p><input type="radio"/> \$0.51 to \$1.00 (2)</p> <p><input type="radio"/> \$1.01 to \$1.50 (3)</p> <p><input type="radio"/> \$1.51 to \$2.00 (4)</p> <p><input type="radio"/> \$2.01 to \$2.50 (5)</p> <p><input type="radio"/> \$2.51 to \$3.00 (6)</p> <p><input type="radio"/> \$3.01 to \$3.50 (7)</p> <p><input type="radio"/> \$3.51 to \$4.00 (8)</p> <p><input type="radio"/> \$4.00 or more (9)</p> <p>End of Block: Block 4</p> <p>Start of Block: Block 27</p> <p>Display This Question:</p> <p>If In the last 90 days, have you featured oysters on your menu? = Yes</p> <p>Q11 From what source(s) do you buy your oysters? Check all that apply.</p> <p><input type="checkbox"/> Regional distributor (1)</p> <p><input type="checkbox"/> Local market (2)</p> <p><input type="checkbox"/> Directly from producer (3)</p> <p><input type="checkbox"/> Other (4) _____</p> <p>Display This Question:</p> <p>If In the last 90 days, have you featured oysters on your menu? = Yes</p> <p>Page 8 of 22</p>	<p>Q12 Please provide the names of up to 3 suppliers from whom you purchase oysters.</p> <p><input type="radio"/> Supplier 1 name (1) _____</p> <p><input type="radio"/> Supplier 2 name (2) _____</p> <p><input type="radio"/> Supplier 3 name (3) _____</p> <p>End of Block: Block 27</p> <p>Start of Block: Block 32</p> <p>Display This Question:</p> <p>If If Please provide the names of up to 3 suppliers from whom you purchase oysters. Supplier 1 name is Not Empty</p> <p>Page 9 of 22</p>
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Appendix 8.2: Restaurant survey

Q20 To the best of your knowledge, and in your opinion, which of the following statements are true about each supplier?			
	\$(Q12/ChoiceTextEntryValue/1) (1)	If Please provide the names of up to 3 suppliers from whom you purchase oysters. Supplier 2 name is Not Empty \$(Q12/ChoiceTextEntryValue/2) (2)	If Please provide the names of up to 3 suppliers from whom purchase oysters. Supplier 3 name is Not Empty \$(Q12/ChoiceTextEntryValue/3) (3)
Low-cost (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can buy large basket of goods from this supplier (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Good customer service/delivery (3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Good customer service/delivery (4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High-quality (5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consistently able to supply your needs (6)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offers NC oysters (7)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall, you are happy with this supplier (8)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

End of Block: Block 32
Start of Block: Block 22
Display This Question:
If in the last 90 days, have you featured oysters on your menu? = Yes

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 | Q24 How would you rate the importance of the following factors when sourcing oysters? | | | | | |---------------------------------------------------------------------------------------|-----------------------|------------------------|-----------------------|-----------------------| | | Not important (1) | Somewhat important (2) | Important (3) | Very important (4) | | Price (1) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | | Quality (2) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | | Specific producer(s) (3) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | | Consistent availability of minimum quantity (4) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | End of Block: Block 22 Start of Block: Block 5 Display This Question: If in the last 90 days, have you featured oysters on your menu? = Yes Q25 When considering location while sourcing oysters, which statement most applies? ☐ You try to source oysters from our own state (1) ☐ You try to source oysters from another preferred state/region (2) ☐ You try to source oysters from a variety of locations (3) ☐ Location is not an important factor in your sourcing decisions (4) ☐ Other (5) _____ End of Block: Block 5 Start of Block: Block 19 Display This Question: If Would you consider adding oysters to your menu at any point in the future? = No Page 11 of 22 | | Q21 For each of the following states, please check all of the qualifies you believe apply to that state's oysters. | | | | | | | | |--------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------| | | Small in size (1) | Large in size (2) | Good flavors (3) | Easy to obtain (4) | Available year-round (5) | Low cost (6) | High cost (7) | | Maine (1) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | Washington (2) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | Maryland (3) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | Virginia (4) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | North Carolina (5) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | Louisiana (6) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | End of Block: Block 19 Start of Block: Block 31 Display This Question: If in the last 90 days, have you featured oysters on your menu? = Yes Q19 Do you ever consider whether an oyster is farm-raised or wild when sourcing oysters? ☐ Yes, you prefer farm-raised oysters (1) ☐ Yes, you prefer wild harvest oysters (2) ☐ No (3) End of Block: Block 31 Start of Block: Block 23 Page 12 of 22 |



Appendix 8.2: Restaurant survey

Q23 Which of the following statements do you agree with most?

- ☐ Oysters are unsafe to eat during the summer (1)
- ☐ Oysters are safe to eat during the summer, but do not taste as good as during other seasons (2)
- ☐ Oysters are safe to eat during the summer and taste as good as during other seasons (3)
- ☐ Not sure (4)

End of Block: Block 23

Start of Block: Block 26

Q43 Myth-busting:

An old piece of advice, which many people have heard, is that one should not eat oysters during the summer. However, this is not true.

Most wild oysters reproduce during the summer which can cause them to have a more "squishy" texture than at other times of the year. Farm-raised oysters are indistinguishable in taste and texture from wild oysters (outside of the summer months). Farm-raised oysters are also sterile and do not reproduce. This means their taste and texture is consistent throughout the year—including during the summer.

Warmer months do pose more of a threat to water quality and food safety, but oysters that are sold in and to restaurants and stores are monitored in the water and carefully handled to ensure they remain safe to eat throughout the year.

End of Block: Block 26

Start of Block: Block 16

Q15 "Merroir" is the concept that an oyster's size, texture, color, flavor, and other qualities are determined by that oyster's unique growing conditions, such as water temperature, water salinity, presence of sea grasses in the water, etc. Each batch of oysters from a producer will be a little different and oysters from different areas tend to have different merroirs.

Merroir is analogous in many ways to "terroir", which is typically discussed in the context of tasting wine.

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Please rate your familiarity with the concept of merroir before taking this survey.

- ☐ Extremely familiar (1)
- ☐ Very familiar (2)
- ☐ Somewhat familiar (3)
- ☐ Not so familiar (4)
- ☐ Not at all familiar (5)

End of Block: Block 16

Start of Block: Block 25

Q40 Many rural fishing communities have experienced an economic downturn over recent decades as the commercial fishing industry has declined. Oyster production may be a more sustainable source of jobs for these communities. By purchasing oysters, you support these communities by providing sustainable jobs for oyster producers and the other businesses that support them.

Based only on the statement above and your knowledge prior to taking this survey, how would you rate your level of agreement with the statement?

- ☐ Strongly agree (1)
- ☐ Agree (2)
- ☐ Neither agree nor disagree (3)
- ☐ Disagree (4)
- ☐ Strongly disagree (5)

End of Block: Block 25

Start of Block: Block 26

Q48 Oysters play a valuable role in coastal ecosystems. One benefit that oysters provide is water filtration. A single oyster can clean up to 50 gallons of water a day. By purchasing oysters, you provide incentives for oyster

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producers to increase the number of oysters in the water. This will lead to cleaner water and healthier ecosystems.

Based only on the statement above and your knowledge prior to taking this survey, how would you rate your level of agreement with the statement?

- ☐ Strongly agree (1)
- ☐ Agree (2)
- ☐ Neither agree nor disagree (3)
- ☐ Disagree (4)
- ☐ Strongly disagree (5)

End of Block: Block 26

Start of Block: Block 21

Display This Question:

If Would you consider adding oysters to your menu at any point in the future? I= No

Q22 Please rate how persuasive you find each of the following potential reasons for adding oysters to (or keeping them on) your menu:

	Unpersuasive (1)	Somewhat persuasive (2)	Persuasive (3)	Very persuasive (4)
Benefits to rural communities (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental benefits (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oysters are a high-margin product (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Voiced demand by customers (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your own taste for oysters (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: Block 21

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Appendix 8.2: Restaurant survey

<p>Start of Block: Block 20</p> <p>Q17 Before taking this survey, were you familiar with the concept of a visitor "trail" that includes multiple "stops" designed to promote a local food, beverage, or cultural element?</p> <p><input type="radio"/> Yes (1)</p> <p><input type="radio"/> No (2)</p> <p>End of Block: Block 20</p> <p>Start of Block: Block 6</p> <p>Display This Question:</p> <p>If Would you consider adding oysters to your menu at any point in the future? != No</p> <p>Page 16 of 22</p>	<p>Q23 If a North Carolina Oyster Trail were launched, how persuasive would you find each of the following potential reasons to participate? (Applicable even if not located in North Carolina)</p> <table border="1"><thead><tr><th></th><th>Unpersuasive (1)</th><th>Somewhat persuasive (2)</th><th>Persuasive (3)</th><th>Very persuasive (4)</th></tr></thead><tbody><tr><td>Increase in number of customers (1)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Ability to charge higher prices for North Carolina oysters (2)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Increased publicity for your business (3)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Ability to contribute to rural communities (4)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Ability to contribute to environmental quality (5)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Ability to contribute to "eating local" (6)</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr></tbody></table> <p>End of Block: Block 6</p> <p>Start of Block: Block 7</p> <p>Display This Question:</p> <p>If Would you consider adding oysters to your menu at any point in the future? != No</p> <p>Page 17 of 22</p>		Unpersuasive (1)	Somewhat persuasive (2)	Persuasive (3)	Very persuasive (4)	Increase in number of customers (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ability to charge higher prices for North Carolina oysters (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Increased publicity for your business (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ability to contribute to rural communities (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ability to contribute to environmental quality (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ability to contribute to "eating local" (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<p>Q25 How interested is your business in participating in a North Carolina Oyster Trail?</p> <p><input type="radio"/> Not at all interested (1)</p> <p><input type="radio"/> Somewhat interested (2)</p> <p><input type="radio"/> Interested (3)</p> <p><input type="radio"/> Very interested (4)</p> <p>End of Block: Block 7</p> <p>Start of Block: Block 8</p> <p>Display This Question:</p> <p>If Would you consider adding oysters to your menu at any point in the future? != No</p> <p>Q24 What contributions might your business be willing to make in exchange for the ability to participate in a North Carolina Oyster Trail? Check all that apply.</p> <p><input type="checkbox"/> Commitment to serving some North Carolina oysters whenever available (1)</p> <p><input type="checkbox"/> Distributing Oyster Trail pamphlets (which may advertise other businesses that sell North Carolina oysters) (2)</p> <p><input type="checkbox"/> Listing state of origin on oyster menu (3)</p> <p><input type="checkbox"/> Educating customers about merroir (4)</p> <p><input type="checkbox"/> Educating customers about environmental benefits (5)</p> <p><input type="checkbox"/> Educating customers about benefits to rural communities (6)</p> <p><input type="checkbox"/> Participating annually in a survey similar to this one (7)</p> <p>End of Block: Block 8</p> <p>Start of Block: Block 11</p> <p>Display This Question:</p> <p>If Would you consider adding oysters to your menu at any point in the future? != No</p> <p>Page 18 of 22</p>
	Unpersuasive (1)	Somewhat persuasive (2)	Persuasive (3)	Very persuasive (4)																																	
Increase in number of customers (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																	
Ability to charge higher prices for North Carolina oysters (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																	
Increased publicity for your business (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																	
Ability to contribute to rural communities (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																	
Ability to contribute to environmental quality (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																	
Ability to contribute to "eating local" (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																	



Appendix 8.2: Restaurant survey

Q28 One possible model of funding the marketing efforts for an oyster trail relies on membership fees. Based on the value you think participating in a North Carolina Oyster trail could provide to your business, would your business be willing and able to pay an annual fee of \$500 to participate in a North Carolina Oyster Trail?

- ☐ Yes (1)
☐ No (2)

Display This Question:
If One possible model of funding the marketing efforts for an oyster trail relies on membership fees... = Yes

Q29 One possible model of funding the marketing efforts for an oyster trail relies on membership fees. Based on the value you think participating in a North Carolina Oyster trail could provide to your business, would your business be willing and able to pay an annual fee of \$1000 to participate in a North Carolina Oyster Trail?

- ☐ Yes (1)
☐ No (2)

Display This Question:
If One possible model of funding the marketing efforts for an oyster trail relies on membership fees... = No

Q26 One possible model of funding the marketing efforts for an oyster trail relies on membership fees. Based on the value you think participating in a North Carolina Oyster trail could provide to your business, would your business be willing and able to pay an annual fee of \$250 to participate in a North Carolina Oyster Trail?

- ☐ Yes (1)
☐ No (2)

Display This Question:
If One possible model of funding the marketing efforts for an oyster trail relies on membership fees... = No

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Q30 One possible model of funding the marketing efforts for an oyster trail relies on membership fees. Based on the value you think participating in a North Carolina Oyster trail could provide to your business, would your business be able and willing to pay an annual fee of \$750 to participate in a North Carolina Oyster Trail?

- ☐ Yes (1)
☐ No (2)

Display This Question:
If One possible model of funding the marketing efforts for an oyster trail relies on membership fees... = No

Q27 One possible model of funding the marketing efforts for an oyster trail relies on membership fees. Based on the value you think participating in a North Carolina Oyster trail could provide to your business, would your business be willing and able to pay an annual fee of \$100 to participate in a North Carolina Oyster Trail?

- ☐ Yes (1)
☐ No (2)

End of Block: Block 11

Start of Block: Block 28

Display This Question:
If Would you consider adding oysters to your menu at any point in the future? = No

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Q47 What reasons contribute to your lack of interest in featuring oysters on your menu? Check all that apply.

- ☐ They don't fit with the rest of the menu (1)
☐ You don't think your customers would want them (2)
☐ You can't obtain them/it would be too much work (3)
☐ They are too expensive (4)
☐ Your staff is unfamiliar with how to handle/serve them (5)
☐ Potential health liability (6)
☐ Other (7) _____

End of Block: Block 26

Start of Block: Block 29

Display This Question:
If How interested is your business in participating in a North Carolina Oyster Trail? = Not at all interested

Q48 What reasons contribute you your lack of interest in participating in a North Carolina Oyster Trail?

- ☐ It would be too much work (1)
☐ You don't need any extra business (2)
☐ You don't believe there are significant benefits to participation (3)
☐ The requirements would be too burdensome (4)
☐ It would not be a good fit for our brand (5)
☐ Other (6) _____

End of Block: Block 29

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Appendix 8.2: Restaurant survey

Start of Block: Block 13

Q32 Is there anything else you would like to tell us?

End of Block: Block 13

Start of Block: Block 30

Q31 If you are open to being contacted in the future about the development of the North Carolina Oyster Trail, please provide the following information:

☐ Contact name (1) _____

☐ Phone number (xxx-xxx-xxxx) (2) _____

☐ Email address (3) _____

End of Block: Block 30

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